Commonwealth of Massachusetts
Executive Office of Health and Human Services

Virtual Gateway

SHORE Training Manual-Family

May, 17 2006

Introduction

Background

In 2001 Congress directed the US Department of Housing and Urban Development (HUD) to work in conjunction with local jurisdictions, or "Continua of Care," to begin to collect an array of data on homelessness. The goal was to collect information to facilitate an unduplicated count of homeless persons and analysis of homeless assistance systems usage by homeless persons, as well as analysis of such systems. Those Continua of Care receiving HUD's supportive housing (SHP) funds are required to enter data into a Homeless Management Information System (HMIS). The Department of Transitional Assistance (DTA) developed the Statewide Homeless Operations and Research Environment (SHORE) to meet the HMIS requirement both for its own Balance of State Continuum of Care and for any other Massachusetts continuum or homeless service provider that chooses to use it.

SHORE provides the Commonwealth's homeless shelters and providers with a web-based system that offers:

- The capacity to assign specific shelter beds to homeless individuals.
- An electronic system for entering and tracking programs and services provided to homeless individuals and families.
- The capacity to upload pre-existing information into SHORE and the ability to download information in electronic formats.
- The capacity to generate pre-defined, on-demand reports for data quality and program management.
- The capacity to determine if mainstream services and benefits are being received by homeless individuals and the potential to submit cross-matches of records within SHORE to other State Agencies (where legally appropriate).
- Provider-driven functionality, updated through an interactive, inclusive design process.

Scope

This SHORE Manual is intended for all specified levels of user. It provides step-by-step instructions for activities required to operate SHORE (otherwise known as HMIS–Homeless Management Information System).

Users of SHORE may be able to view and search for information regarding homeless individuals and/or homeless families and the services and programs available to them. However, the ability to add, edit or save information from certain areas may be restricted. The Access Administrator for each Homeless Service Provider Agency using SHORE will determine which “role,” or security rights, each user has. Please see Appendices A and B for detailed definitions and descriptions of these roles.

For assistance or questions regarding the set up and use of the Homeless Management Information System please contact the **Virtual Gateway Help Desk at 1-800-421-0938** or 1-617-988-3301 (TTY) Monday-Friday 9:00-5:00pm.

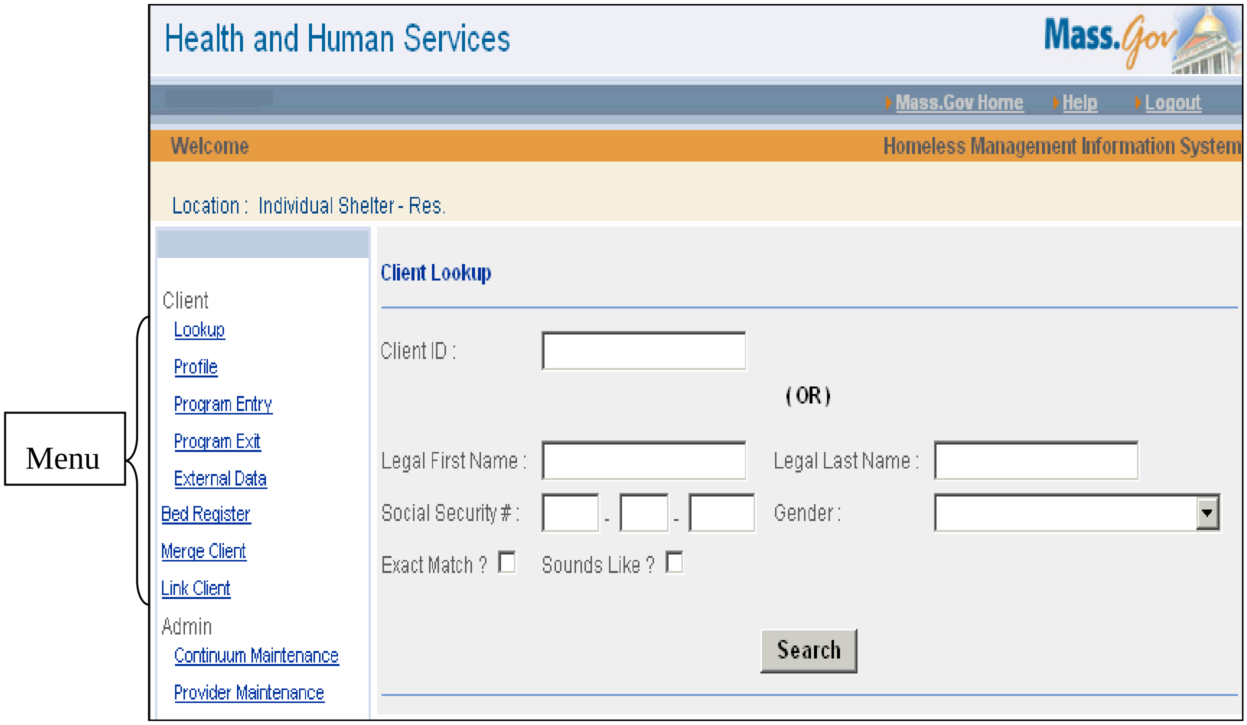
Logging in

Access to SHORE is through the Executive Office of Health and Human Services' (EOHHS) portal otherwise known as the Virtual Gateway portal on the World Wide Web.

Logging In Steps

To log onto the Virtual Gateway:

Steps	Action
1	Open the Web Browser (such as Internet Explorer). Type the following web address into the Address field: https://gateway.hhs.state.ma.us/portal/dt *Please note: This web address can be "bookmarked" using the Favorites menu on the Internet Standard toolbar for easier access to SHORE.*
2	Enter your User name and Password into the Log in Fields. Click on **Submit** or press the Enter key on the keyboard.
3	Click on the **Homeless Management** Link.



WELCOME PAGE

(With Client Menu)

Please note: Not all users of SHORE have the same security access rights. Security roles will affect how each indiviual user's screen looks. Please see Appendices A and B for a description of roles and the features allowed to each role.

Chapter One: Client Lookup

Introduction

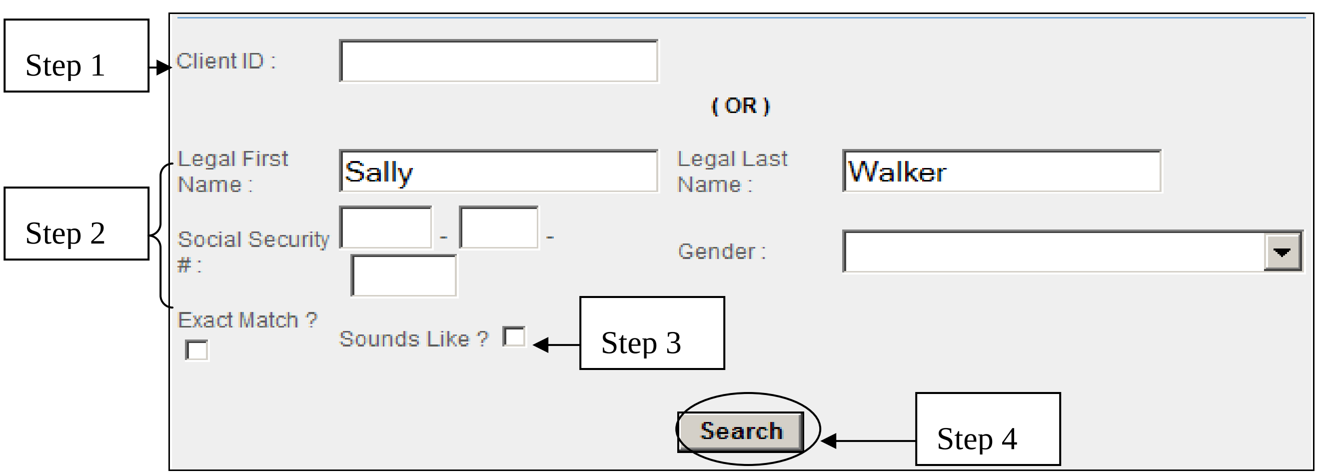
The Client Lookup screen provides the option to search the current database for a client's record. By entering client's First Name, Last Name, Social Security Number, Date of Birth and Gender a record can easily be retrieved.

*A quick-search option can be utilized by entering only the Client ID number **or** by entering a minimum of the first 3 letters of the client's last name. This method will broaden the search, which could be useful in the case of a misspelled name, for instance.*

Steps for Client Lookup

To look up a client within the SHORE:

Steps	Action
1	Enter the Client ID (if available).
2	Enter the client's First Name, Last Name, Social Security Number (SSN), Gender, and/or Date of Birth. *Enter as many fields of information that are available to you. Not all of the fields are required but at minimum the first three letters of the client's Last Name; Social Security Number **or** Client ID is needed.*
3	Select the **Exact Match** or **Sounds Like** box (optional). *A broad client search can be narrowed down by using these functions.*
4	Click **Search** (then scroll down to the bottom of the screen).



Display Results and Selecting Existing Client

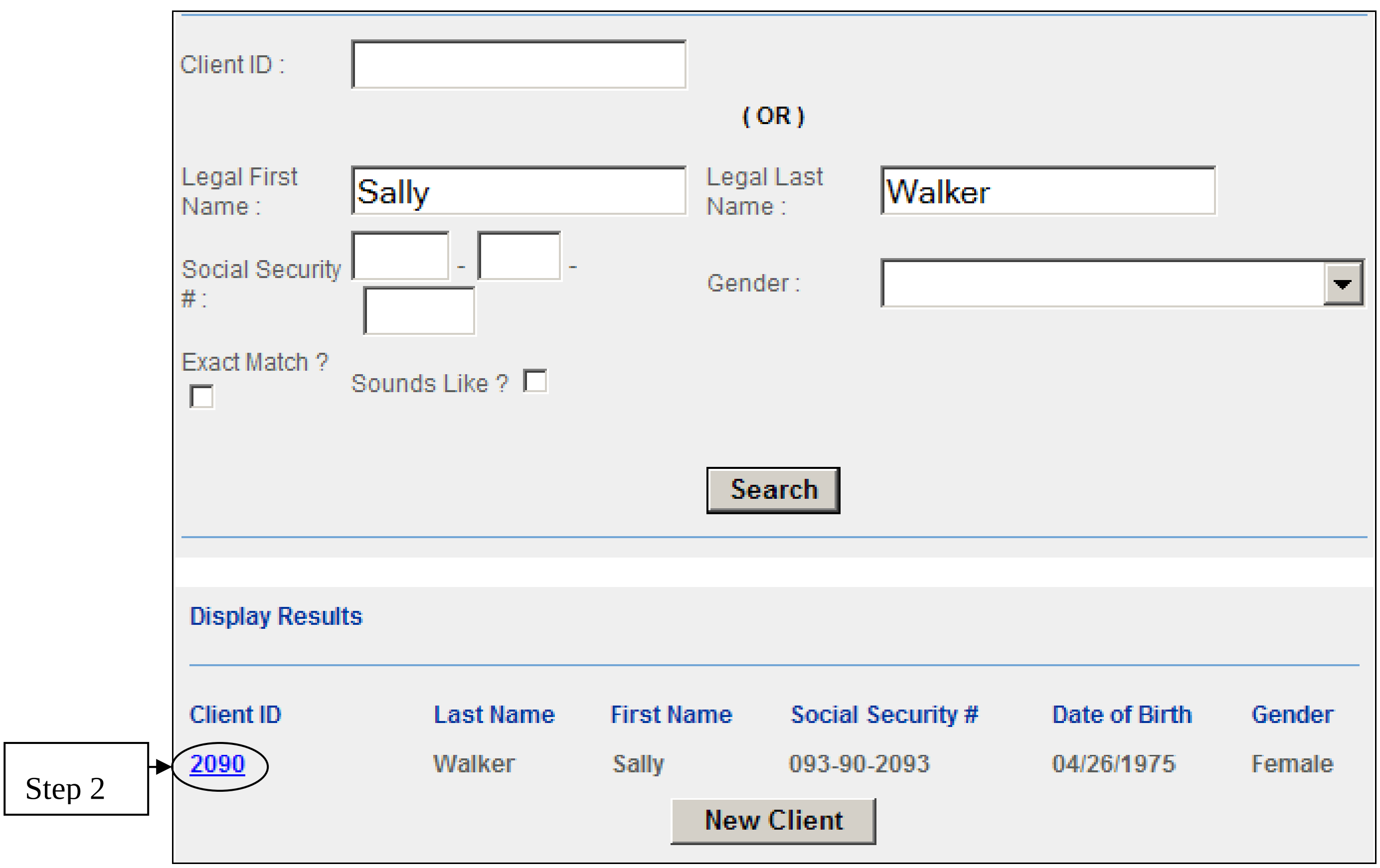
Query results appear in the Display Results area.

If the client has a record in SHORE, the client's name appears in the Display Results area and the client's record can be accessed.

Steps for Display Results

To view the Display Results and to select a client record:

Steps	Action
1	Scroll down the page (once the **Search** button was selected from the previous screen) to view the **Display Results**.
2	Click on the Client ID number to access their record (the Client ID number is a hyperlink to the client's record). Select **Continue** to access the Client Activity Information screen. Select **Edit and Continue** to edit the client's basic information. *If the client's name does not appear in the Display Results go to the next section of this chapter.*



Add a New Client

If the client's name does not appear in the Display Results, either the client's information is not yet in the database or the Client Lookup did not correspond to match any client record (For example, the last name and first name may have been entered incorrectly).

If the client's record is not in SHORE, it will need to be added before any activities can be associated with the client.

Add Client Steps

To add a new client to SHORE:

Steps	Action
1	Select the **New Client** button on the bottom of the Display Results from the Client Lookup page.
2	Enter the client's information in the displayed fields. *The fields with an* ***** *are required.* *Please note: When some questions are answered "yes," follow up questions appear.*
3	Select **Save and Continue** to go to the **Client Activity Information** screen.

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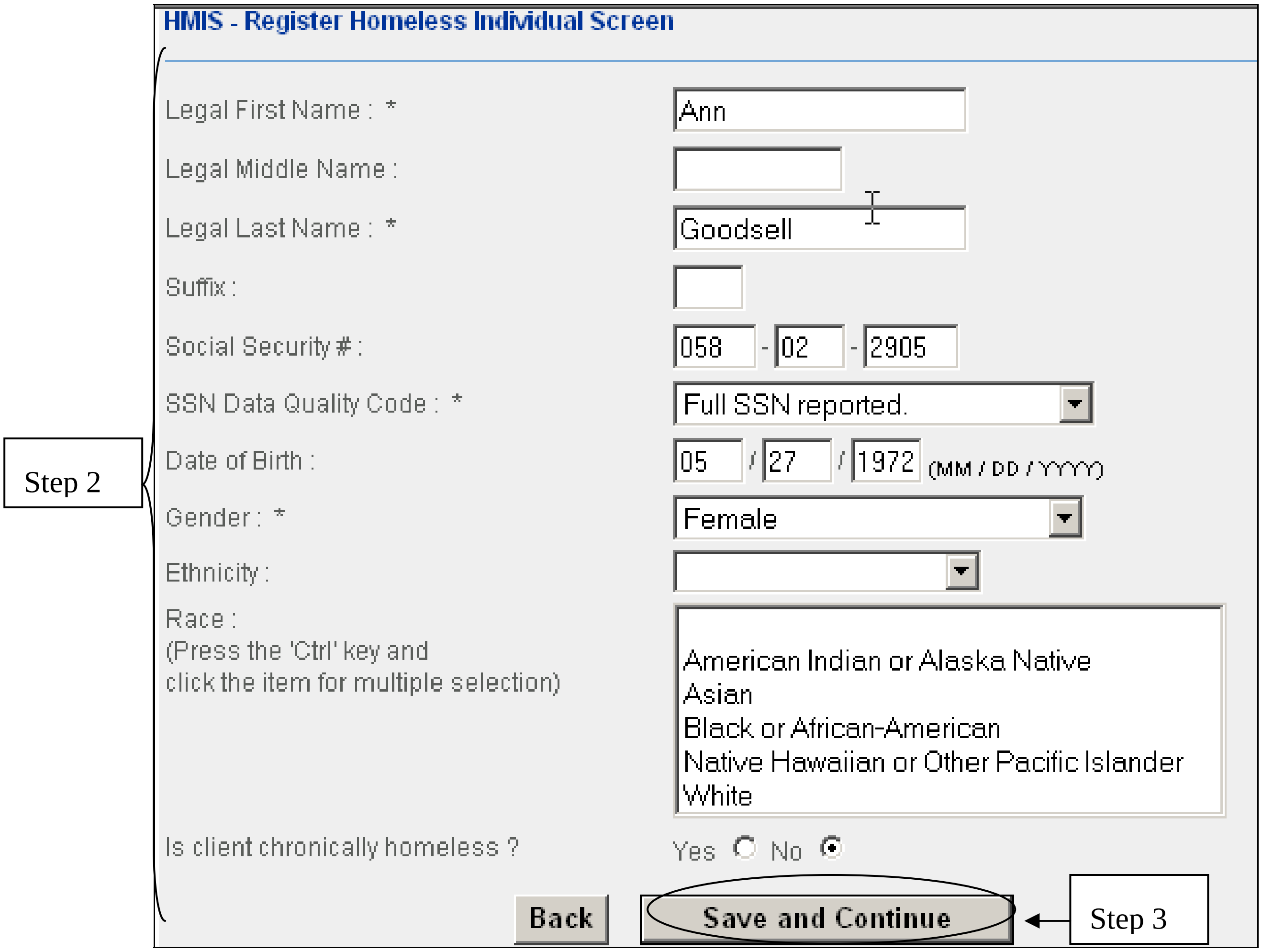


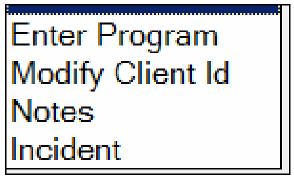
After Save and Continue is selected, this information can be edited at any time by performing a Client Look Up. Then selecting the Client ID number from the Display Results. This will reveal the client's basic information. ***Select Edit and Continue.***

Chapter Two: Client Actions

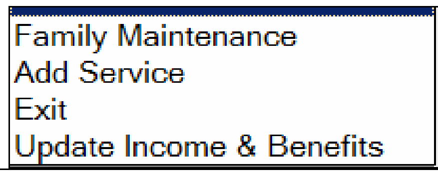
Introduction

The Client Activity Information screen is the client's record, or Profile, and is the starting point to enroll a client into an activity. Both Client and Program Actions can be accessed in this screen.

Clients Actions:

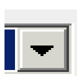


Program Actions:



Symbol Key

The following symbols will be referred to throughout this manual:

	Dropdown Arrow: Click once on this arrow to access a dropdown menu. The dropdown menu displays the choices available for this field.
	Radio Button: Click once in the circle to select from the list of available responses.
+	Plus sign: In SHORE, this indicates a sub-table. Click once on the plus sign to reveal the hidden information. Click again to hide information.
Blue Text	Blue text: Blue text indicates a hyperlink, which links the current screen to another screen within SHORE and can be activated by clicking once. Another term for hyperlink is shortcut. *For example, clicking on* Bed Register *is a shortcut to the Bed Registration page.*
*	An Asterisk: Indicates a question, or required field, that must be answered before continuing to the next screen.

Program Entry

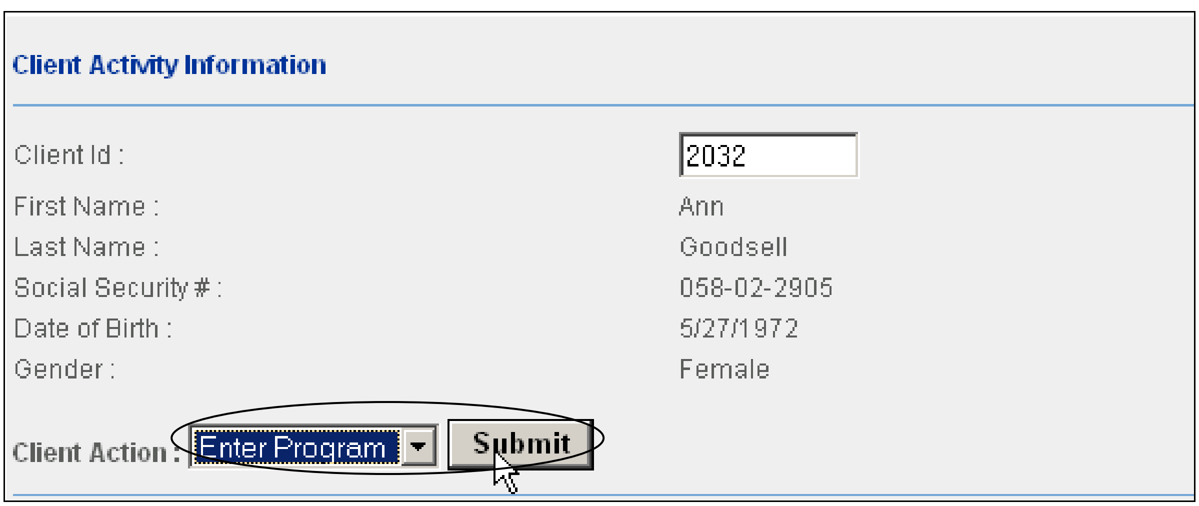
Clients can be entered directly into any or all of the programs offered by the Provider such as a Job Skills Training Program or Substance Abuse Treatment.

There are two ways to access this screen: select Enter Program from the Client Action dropdown menu or click the **Program Entry** hyperlink from the Client Menu (from the left side of the screen).

Program Entry Steps

To enter a client into a Program:

Steps	Action
1	Click on Profile or utilize **Client Lookup** to get to the **Client Activity Information** screen.
2	Select **Enter Program** from the **Client Action** dropdown menu. Click **Submit.**
3	Enter client's information in the displayed fields.
4	Select **Save and Continue.**



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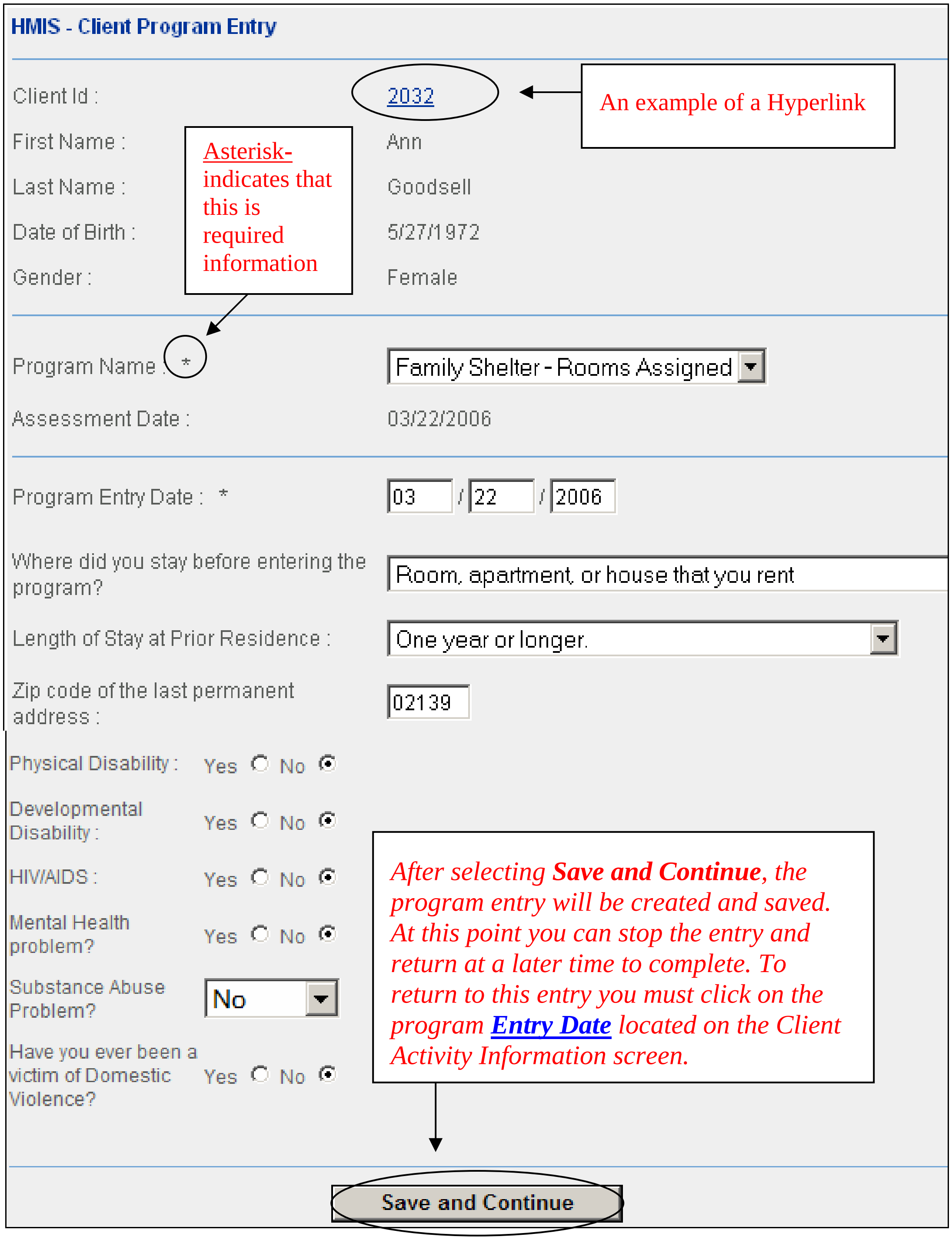

HMIS - Client Program Entry

Client Id : 2032

An example of a Hyperlink

First Name : Ann

Last Name : Goodsell

Date of Birth : 5/27/1972

Gender : Female

Asterisk- indicates that this is required information

Program Name : * Family Shelter - Rooms Assigned

Assessment Date : 03/22/2006

Program Entry Date : * 03 / 22 / 2006

Where did you stay before entering the program? Room, apartment, or house that you rent

Length of Stay at Prior Residence : One year or longer.

Zip code of the last permanent address : 02139

Physical Disability : Yes No

Developmental Disability : Yes No

HIV/AIDS : Yes No

Mental Health problem? Yes No

Substance Abuse Problem? No

Have you ever been a victim of Domestic Violence? Yes No

*After selecting **Save and Continue**, the program entry will be created and saved. At this point you can stop the entry and return at a later time to complete. To return to this entry you must click on the program **Entry Date** located on the Client Activity Information screen.*

Save and Continue

Continued on next page…

Program Entry Continued-

Income and Benefits page

The Program Entry Income and Benefits page records and sums all client income.

Income and Benefits Steps

To enter a client's Income and Benefits information:

Education/General Questions

Steps	Action
1	Answer "Yes" or "No" to the question of the client's employment status. If "Yes," enter the number of **hours per week** and the **rate per hour** (if "No," skip to Step 4).
2	Click once outside these fields (in the gray area surrounding the boxes) to activate the automatically calculated **Estimate Total Monthly Income**.
3	Type the amount from the Estimate Total Monthly Income into the **Earned Income** field under **Income Sources**.
4	Enter all other **Income Sources** in the **Monthly Amount** fields. *Please note: the total Monthly Income sources will also be automatically calculated. This total is located above the Non-Cash Benefits section.*
5	Enter all **Non-Cash Benefits** by checking the **Receive** boxes.
6	Click **Save and Continue.**
7	Answer all Education/General Questions to complete the **Program Entry**.
8	Click **Save and Continue**.

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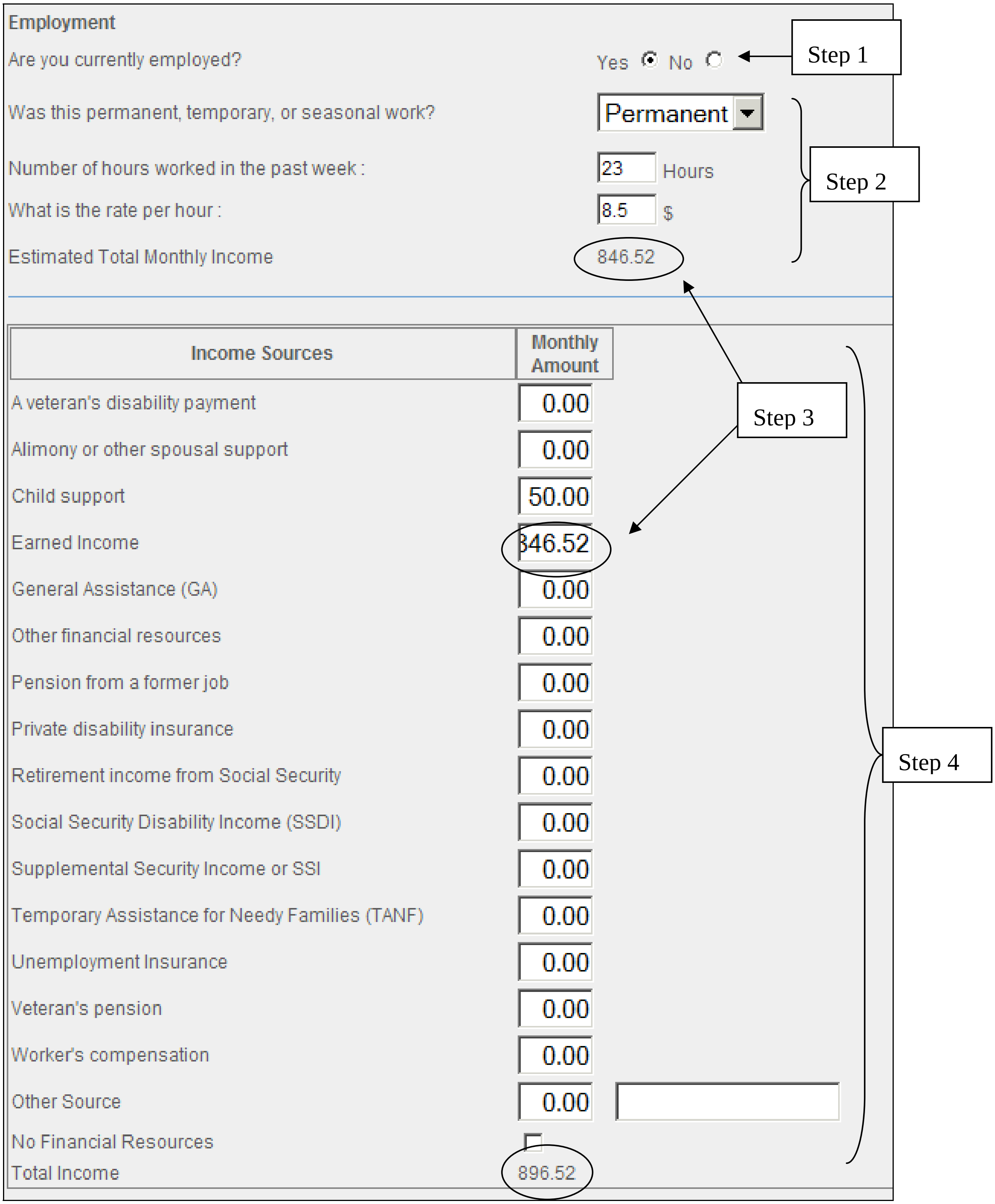

Employment

Are you currently employed? Yes (•) No ( )

Was this permanent, temporary, or seasonal work? Permanent

Number of hours worked in the past week : 23 Hours

What is the rate per hour : 8.5 $

Estimated Total Monthly Income 846.52

Income Sources	Monthly Amount
A veteran's disability payment	0.00
Alimony or other spousal support	0.00
Child support	50.00
Earned Income	846.52
General Assistance (GA)	0.00
Other financial resources	0.00
Pension from a former job	0.00
Private disability insurance	0.00
Retirement income from Social Security	0.00
Social Security Disability Income (SSDI)	0.00
Supplemental Security Income or SSI	0.00
Temporary Assistance for Needy Families (TANF)	0.00
Unemployment Insurance	0.00
Veteran's pension	0.00
Worker's compensation	0.00
Other Source	0.00
No Financial Resources	☐
Total Income	896.52

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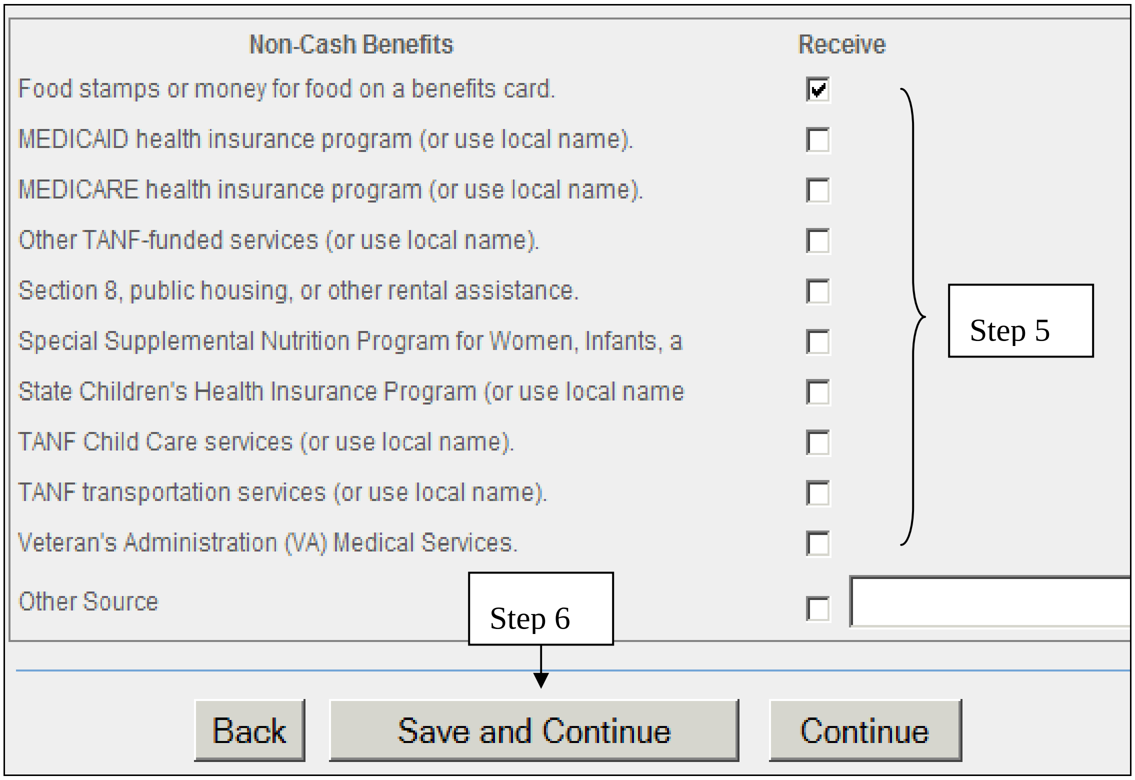
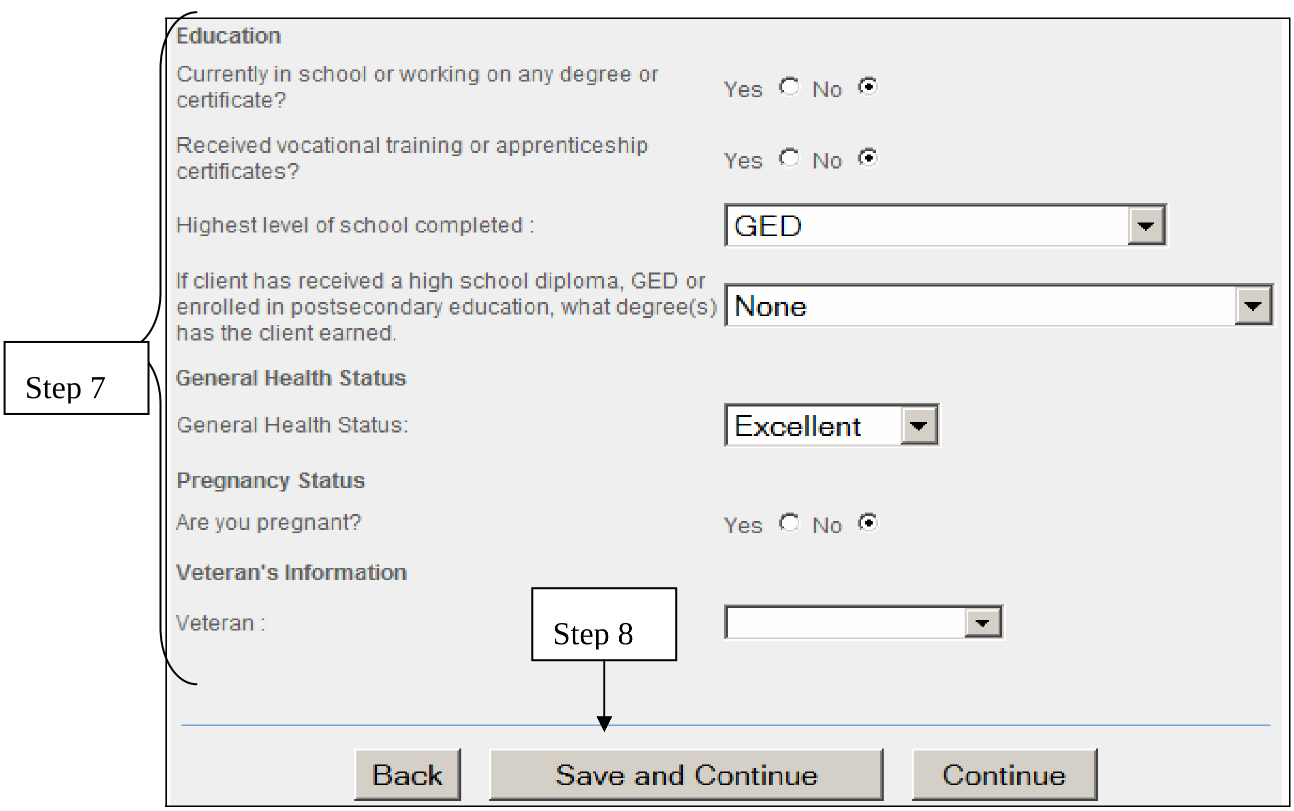

Non-Cash Benefits
Receive
Food stamps or money for food on a benefits card.
MEDICAID health insurance program (or use local name).
MEDICARE health insurance program (or use local name).
Other TANF-funded services (or use local name).
Section 8, public housing, or other rental assistance.
Special Supplemental Nutrition Program for Women, Infants, a
State Children's Health Insurance Program (or use local name
TANF Child Care services (or use local name).
TANF transportation services (or use local name).
Veteran's Administration (VA) Medical Services.
Other Source
Step 5
Step 6
Back
Save and Continue
Continue


Education
Currently in school or working on any degree or certificate?
Yes No
Received vocational training or apprenticeship certificates?
Yes No
Highest level of school completed :
GED
If client has received a high school diploma, GED or enrolled in postsecondary education, what degree(s) has the client earned.
None
General Health Status
General Health Status:
Excellent
Pregnancy Status
Are you pregnant?
Yes No
Veteran's Information
Veteran :
Step 7
Step 8
Back
Save and Continue
Continue

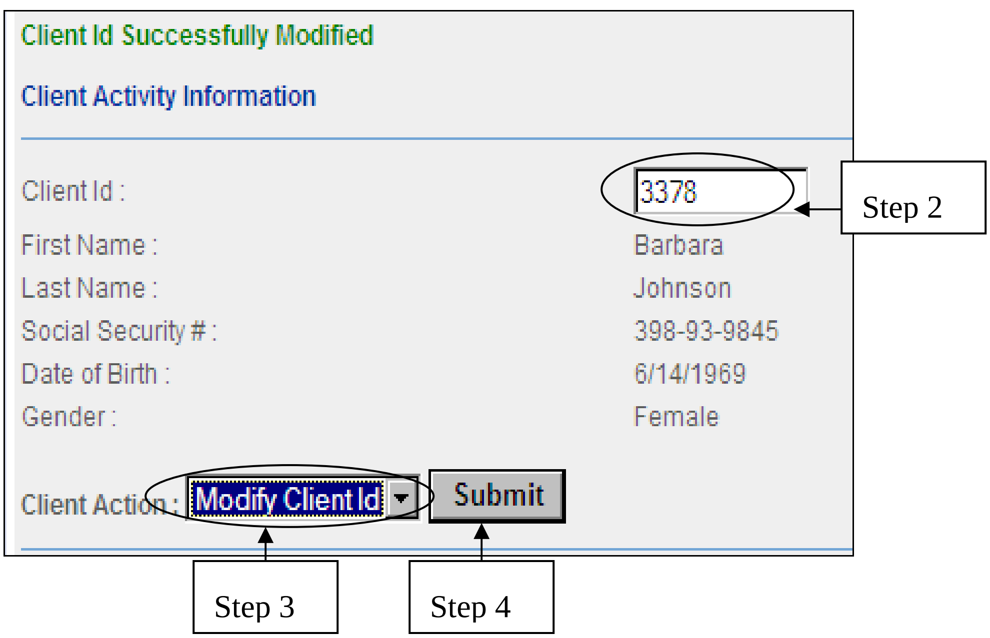
Modify Client ID

There may be certain circumstances when a Client ID needs to be changed and modified. It can be changed to include up to 12 numerical characters.

Modify Client ID Steps

To Modify a Client ID:

Steps	Action
1	Click on Profile or utilize **Client Lookup** to get to the **Client Activity Information** screen.
2	Highlight the current **Client ID** number and retype the new Client ID.
3	Select **Modify Client ID** from the **Client Action** dropdown menu.
4	Click **Submit**.

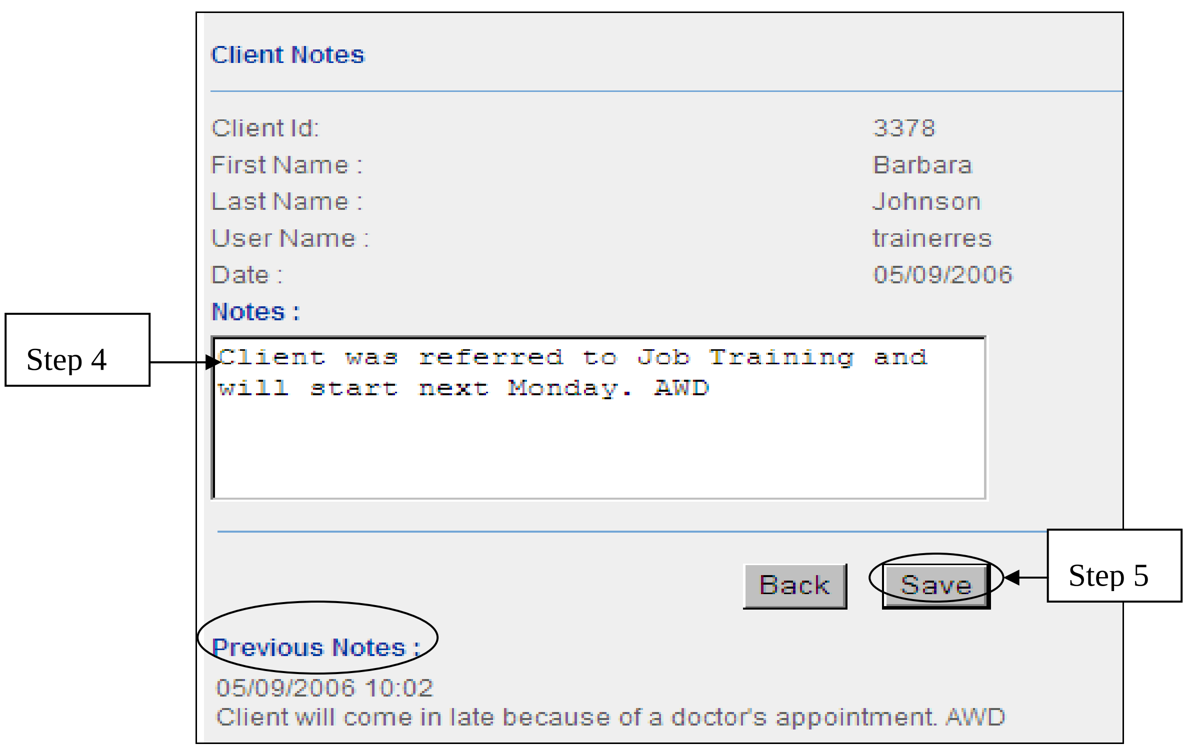


Notes A freeform text box for entering Notes is available for adding specific details to the client's record.

Notes Steps To enter Case Notes:

Steps	Action
1	Click on Profile or utilize **Client Lookup** to get to the **Client Activity Information** screen.
2	Select **Notes** from the **Client Action** dropdown menu.
3	Click the **Submit** button.
4	Enter the notes in the **Notes** field. *Once notes are saved to the SHORE system, they become part of the client's permanent record and cannot be deleted.*
5	Click **Save**.

To review previously entered client notes, follow steps 1, 2 and 3 then scroll down to the bottom of the page.



Incident

There may be situations that require a Shelter to deny admittance of a client because of a rule violation, disruptive behavior, crime, etc. When this occurs, an Incident must be entered into SHORE.

This feature can be used both to report an incident that does not require barring client from a shelter; and to Bar a client for a specified period of time.

Steps to Enter Incidents

To enter an Incident:

Steps	Action
1	Click on Profile or utilize **Client Lookup** to get to the **Client Activity Information** screen.
2	Select **Incident** from the **Client Action** dropdown menu.
3	Click the **Submit** button.
4	Enter the **Date** and type of **Incident**.
5	Enter the notes in the **Description** field. *Once an incident is saved to the SHORE system, it becomes part of the client's permanent record and cannot be deleted.*
6	If this client should be barred from the provider site, select the **Bar from Site** checkbox. Once the checkbox is selected, the **Bar Start** and **End** dates become required fields.
7	Select the **Provider Site** the client is to be barred from.
8	Click **Save**.

To review previously entered Client Incidents, follow steps 1, 2 and 3 then scroll down to the bottom of the page.

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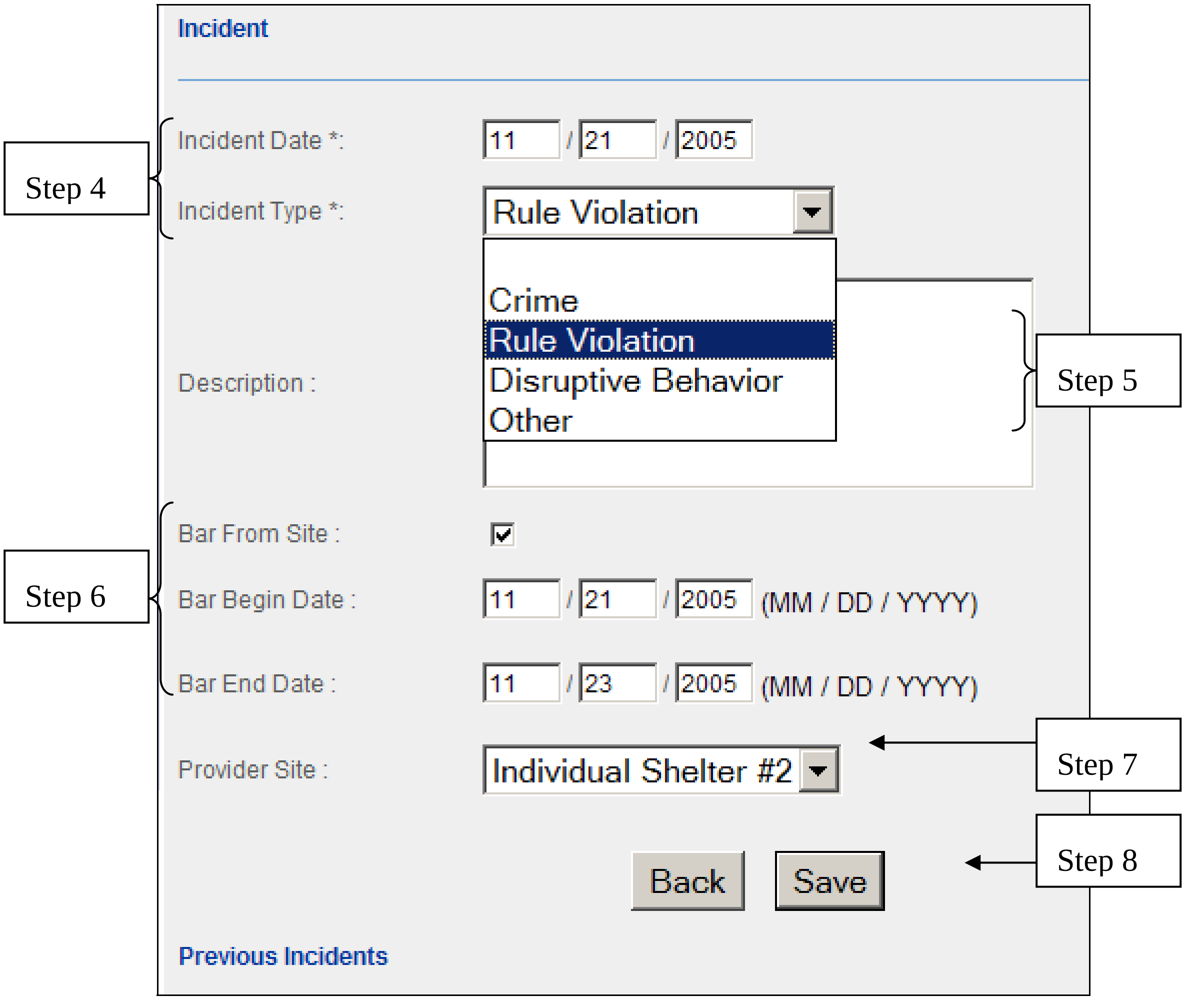
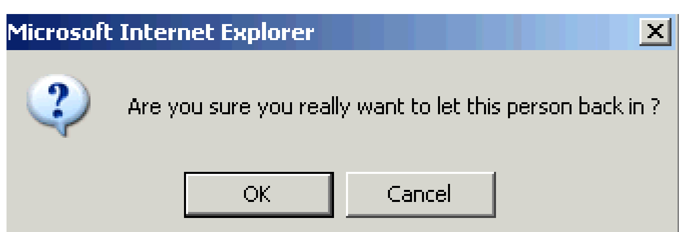


When attempting to enter a barred client into a Program or Service, the following pop up would appear.



Bar Release

When a client has been cleared of any infractions and once again becomes eligible for placement within a Shelter, the Bar Release feature may be utilized.

Bar Release Steps

To release a client from being Barred:

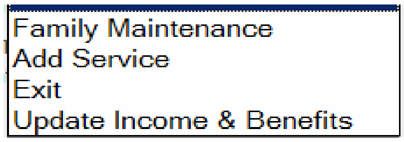
Steps	**Action**
1	Click on Profile or utilize **Client Lookup** to get to the **Client Activity Information** screen.
2	Select **Incident** from the **Client Action** dropdown menu.
3	Click **Submit** and scroll down to the bottom of the page.
4	Select the check box next to the **Incident Date**.
5	Select **Bar Release** from the Action menu. Click **Submit.**

Chapter Three: Program Actions

Introduction

Located on the Client Activity Information Screen, the Program Action menu allows for the addition or update of any services the client may be receiving within a particular program.

Program Actions:



The following pages will demonstrate how each Program Action is accessed.

Family Maintenance

A family member may be added to a client's record in the database at any time.

This Program Action can be used to:

a. Lookup family members already linked together in the database
b. Join family members when both clients already have a record in SHORE (i.e., create a familial relationship between them)
c. Add a new family member that has no previous record of information in the SHORE database.

Family Lookup Steps

To look up family members.

Please note: All family members must be linked together by entering the Grantee's Profile then entering into Family Maintenance.

Steps	Action
1	Click on Profile or utilize **Client Lookup** to get to the **Client Activity Information** screen.
2	Select a Program by clicking on the radio button next to the Program name.
3	Select **Family Maintenance** from the **Program Action** dropdown menu. (This will take you to the Family Lookup screen). Click **Submit**.
4	If any family members have been linked to this client in SHORE or in Beacon, they would be listed in gray at the top of the **Family Lookup Screen**.

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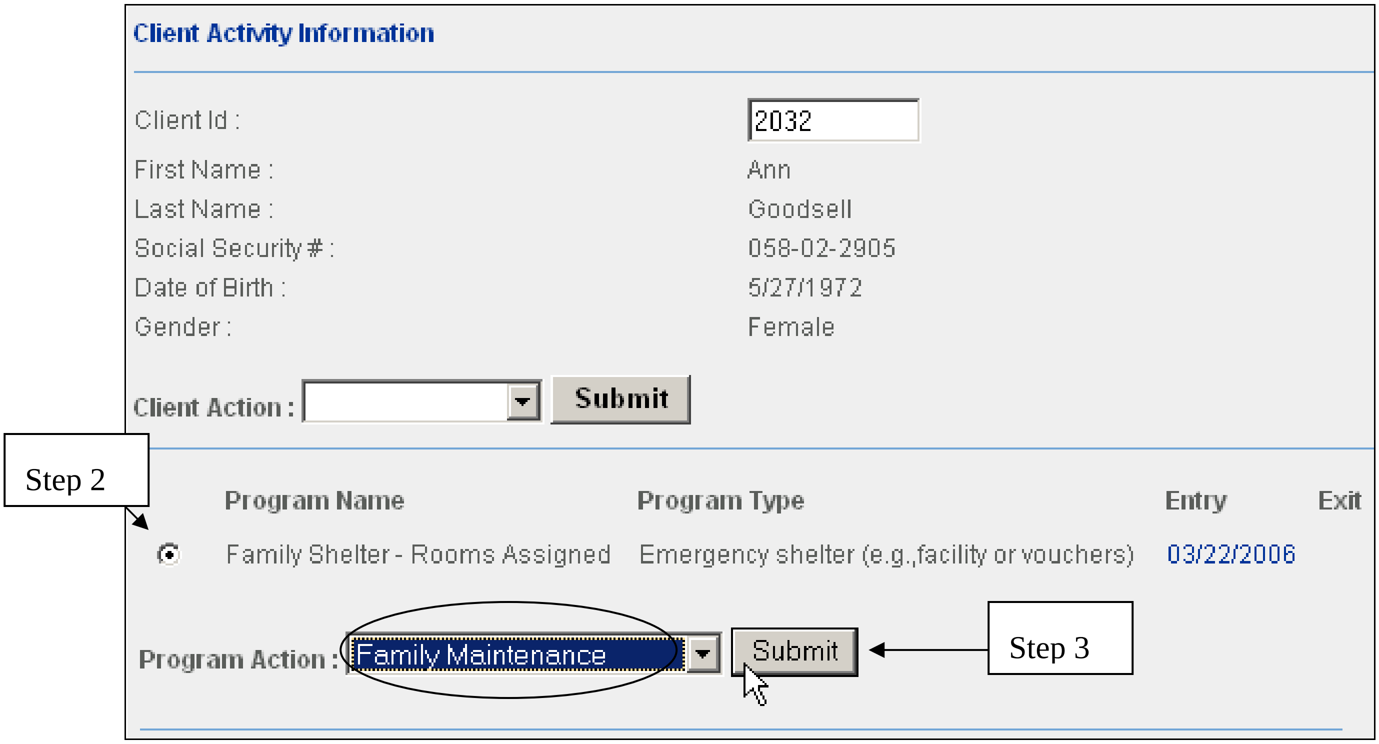


Client Activity Information

Client Id : 2032
First Name : Ann
Last Name : Goodsell
Social Security # : 058-02-2905
Date of Birth : 5/27/1972
Gender : Female

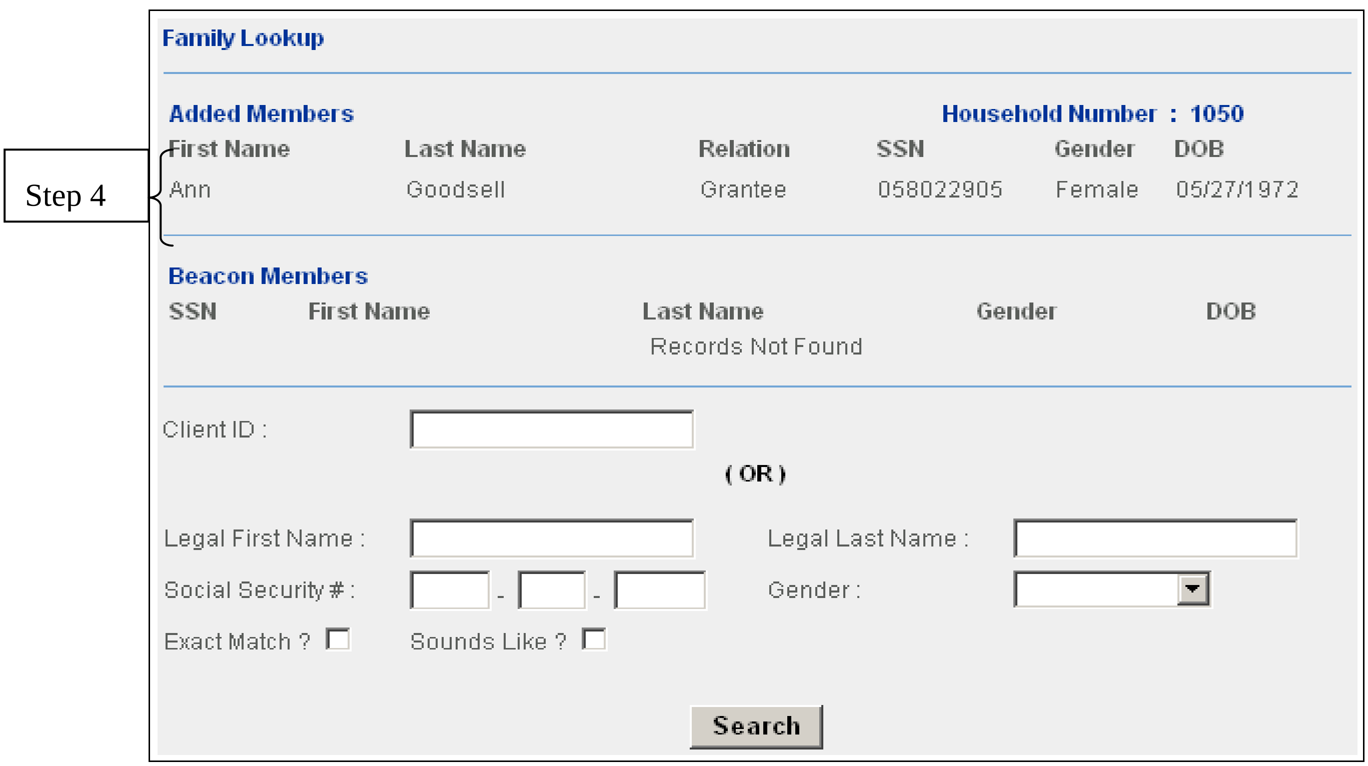
Client Action : Submit

Step 2

Program Name	Program Type	Entry	Exit
Family Shelter - Rooms Assigned	Emergency shelter (e.g.,facility or vouchers)	03/22/2006	

Program Action : Family Maintenance Submit

Step 3



Family Lookup

Added Members **Household Number : 1050**

Step 4

First Name	Last Name	Relation	SSN	Gender	DOB
Ann	Goodsell	Grantee	058022905	Female	05/27/1972

Beacon Members

SSN	First Name	Last Name	Gender	DOB
		Records Not Found		

Client ID :

(OR)

Legal First Name : Legal Last Name :
Social Security # : - - Gender :
Exact Match ? Sounds Like ?

Search

Continued on next page…

Add Family Member Steps

Follow these steps to Add a New Family Member that has no previous record in the SHORE database.

Steps	**Action**.
1	Go to the Client Activity Information Screen. Select a Program by clicking on the radio button next to the Program name. **(This client should be the Head of Household or Grantee).**
2	Select **Family Maintenance** from the Program Action dropdown menu. (This will take you to the Family Lookup screen). Click **Submit**.
3 (optional)	Enter the client's First and Last name in Client Lookup section and click **Search**. (This step is a precaution to make sure the client does not already exist in the SHORE database.)
4	Scroll down to the **Display Results** and if the client name is not listed, click **New Client**.
5	Enter the client's information in the HMIS- Register Homeless Individual Screen. Click **Save and Continue**. (For more information on entering a new client see page 8.)
6	Select the relationship to the Head of Household/Grantee from the dropdown menu.
7	Enter the program data and click **Save and Continue.**
8	Enter the client's information into the **Income and Benefits screen** and click **Save and Continue**
9	Enter the client's information into the **Educational Information Screen** and click **Save and Continue** to complete the family link.

Please note: When adding a **Daughter** or **Son**, the Client Educational Information Screen will have questions about enrollment status and school information regardless of the child's age (See page 26 for screen shot).

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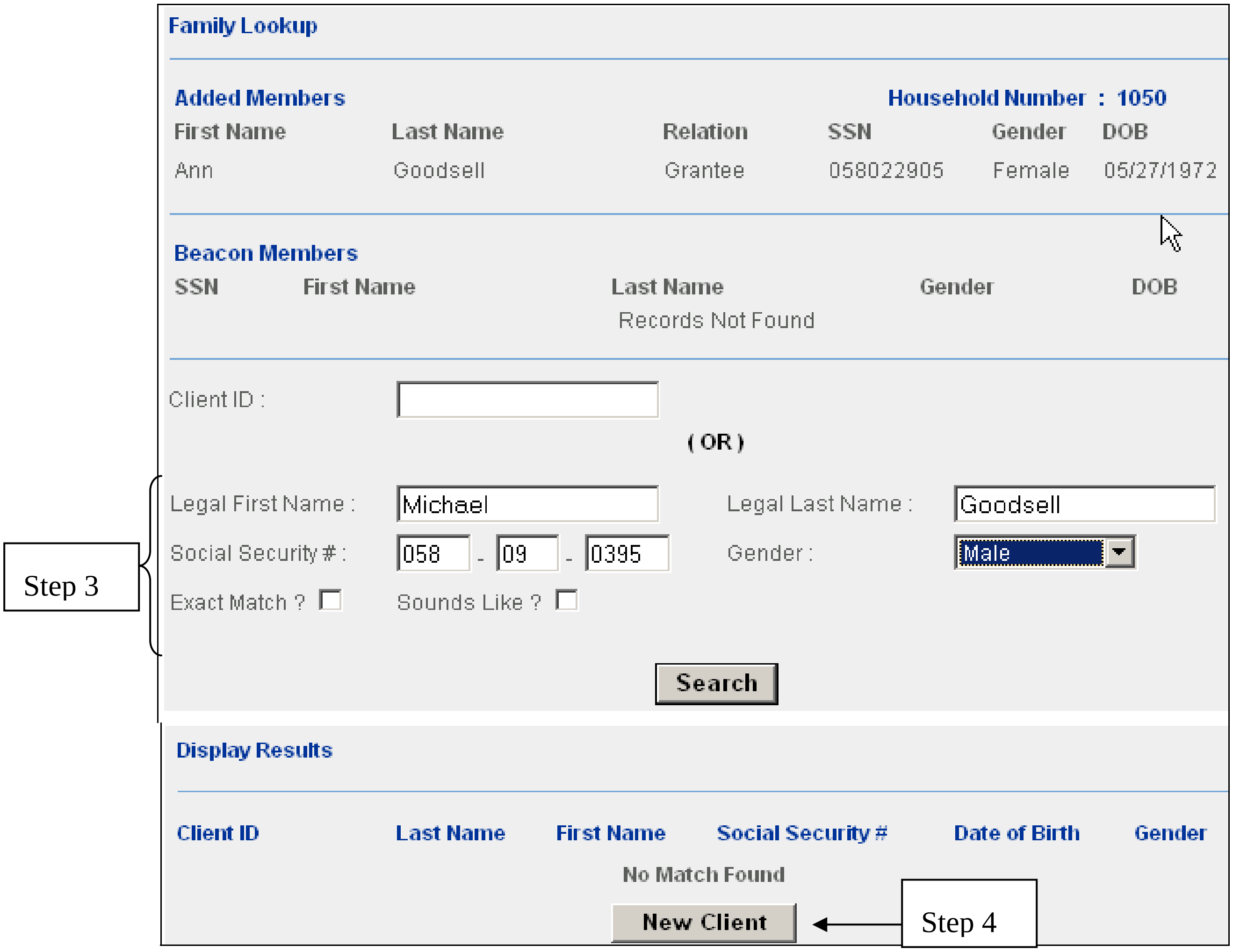

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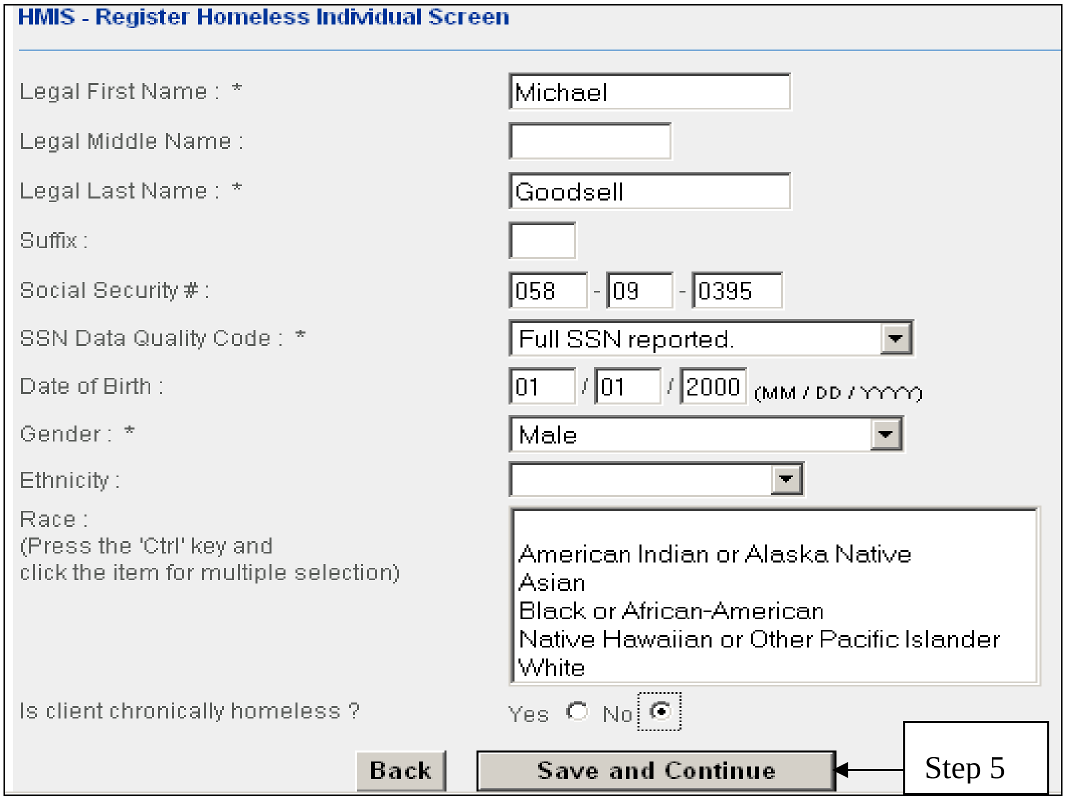
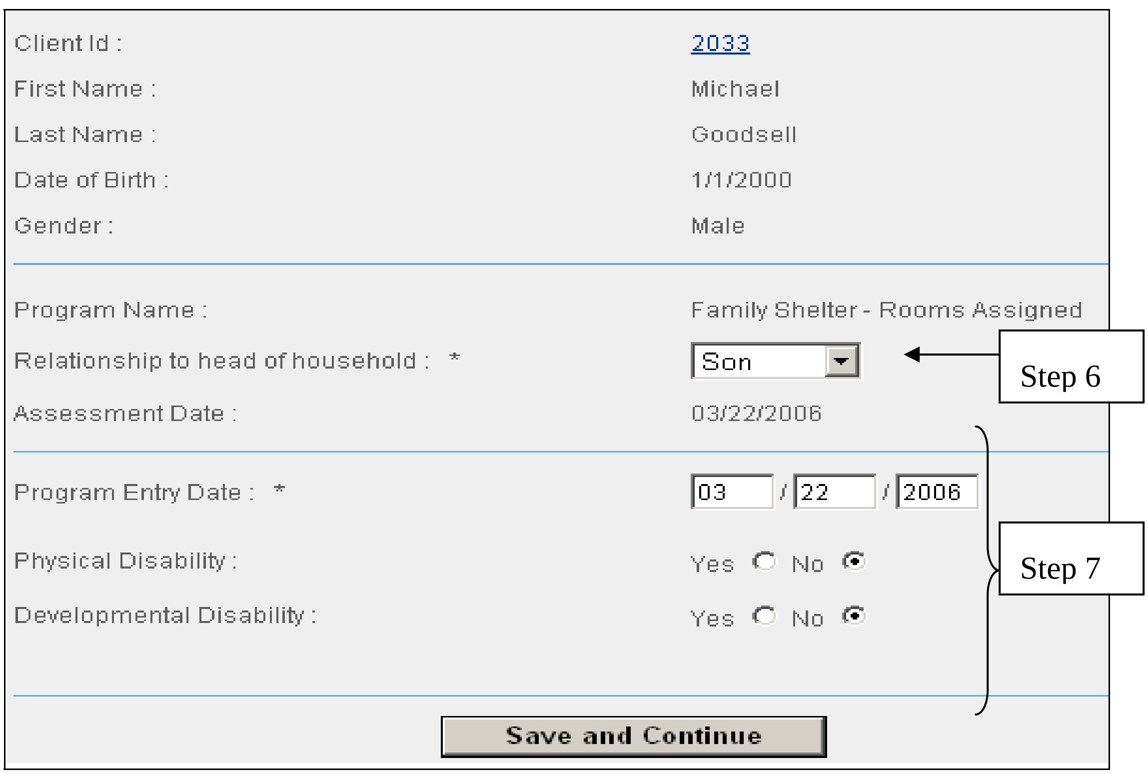


HMIS - Register Homeless Individual Screen

Legal First Name : * Michael
Legal Middle Name :
Legal Last Name : * Goodsell
Suffix :
Social Security # : 058 - 09 - 0395
SSN Data Quality Code : * Full SSN reported.
Date of Birth : 01 / 01 / 2000 (MM / DD / YYYY)
Gender : * Male
Ethnicity :
Race :
(Press the 'Ctrl' key and
click the item for multiple selection)
American Indian or Alaska Native
Asian
Black or African-American
Native Hawaiian or Other Pacific Islander
White
Is client chronically homeless ? Yes No
Back
Save and Continue
Step 5



Client Id : 2033
First Name : Michael
Last Name : Goodsell
Date of Birth : 1/1/2000
Gender : Male

Program Name : Family Shelter - Rooms Assigned
Relationship to head of household : * Son
Step 6
Assessment Date : 03/22/2006

Program Entry Date : * 03 / 22 / 2006
Physical Disability : Yes No
Step 7
Developmental Disability : Yes No

Save and Continue

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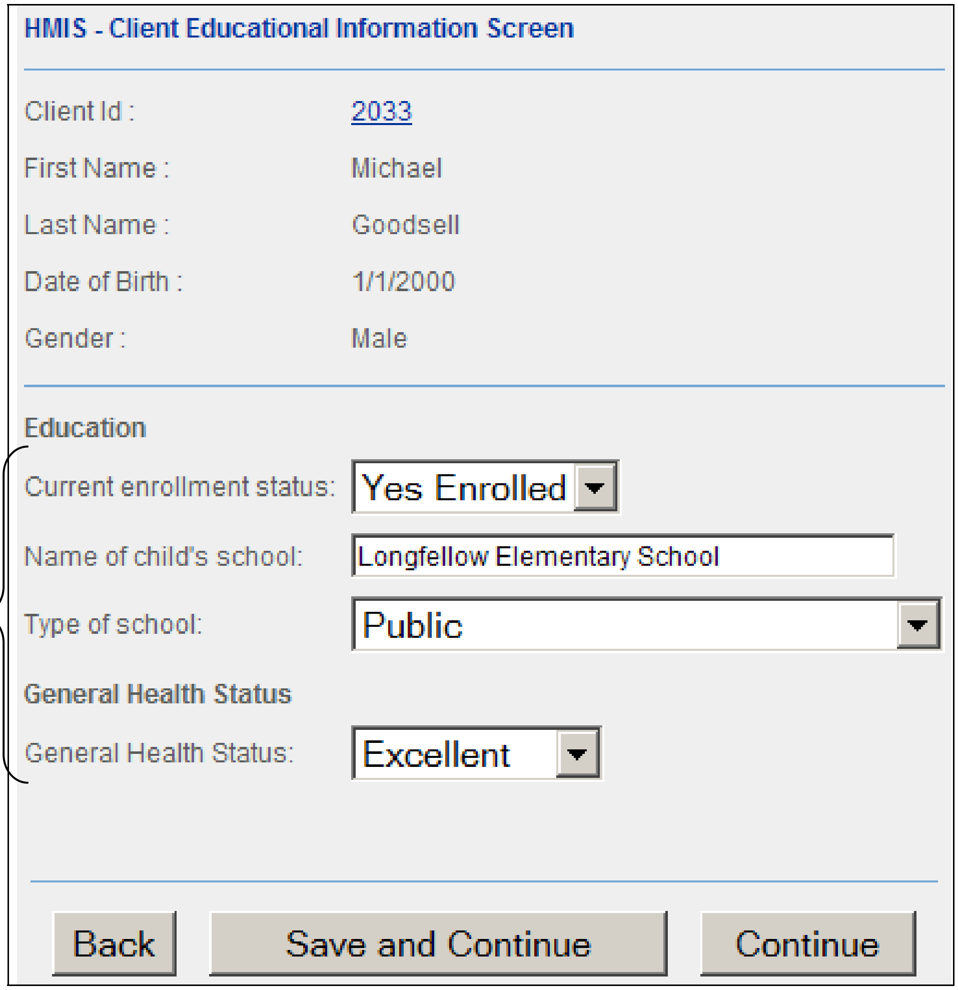
This Client Educational Information Screen asks about Enrollment Status and School details because the client was linked as a Son (or a Daughter) to the Grantee.

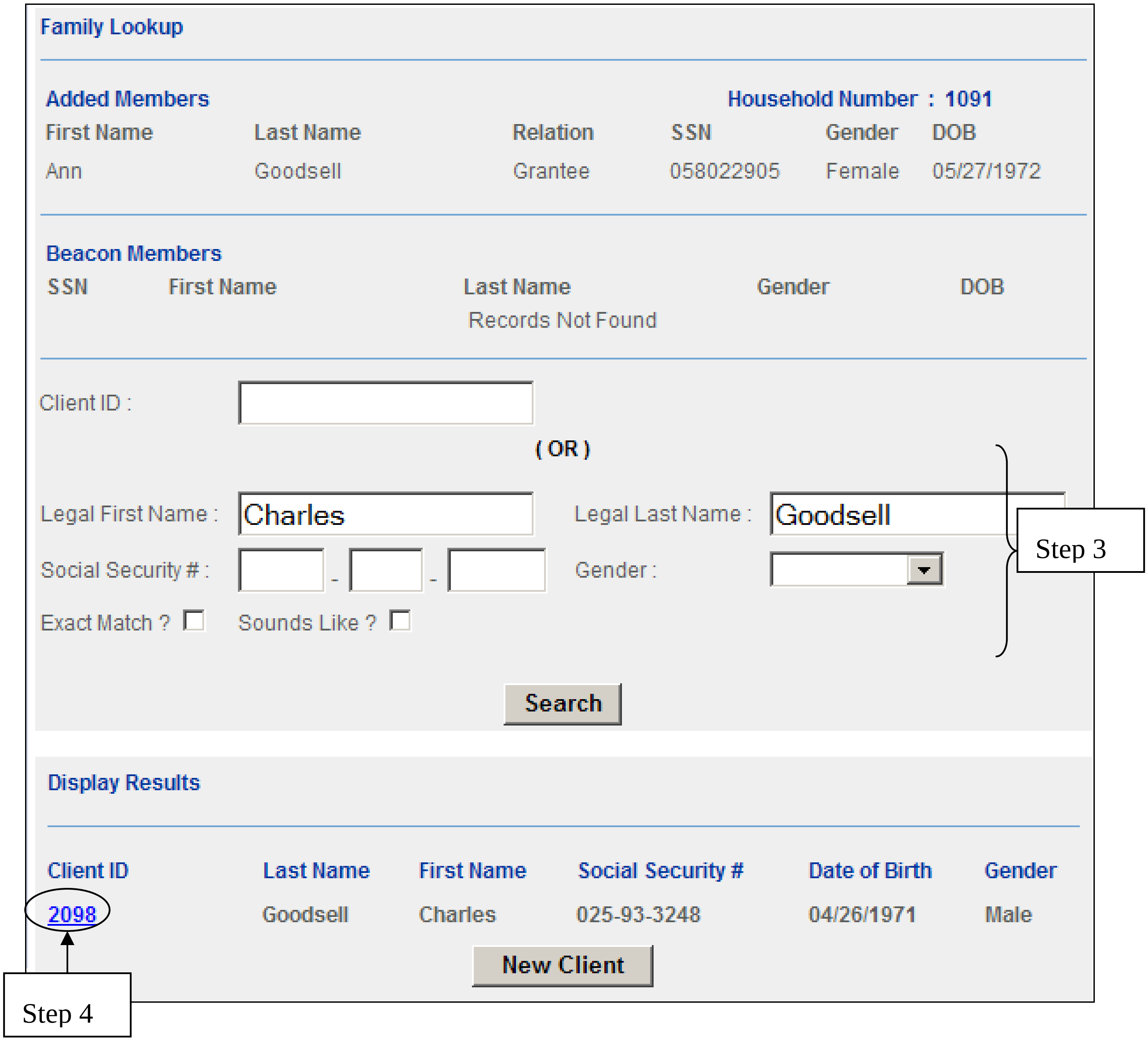
Step 9



Linking Family Members

Follow these steps to link two clients, with records in SHORE, as Family Members.

Steps	**Action**.
1	Go to the Client's Activity Information Screen. Select a Program by clicking on the radio button next to the Program name. **(This client should be the Head of Household or Grantee).**
2	Select **Family Maintenance** from the Program Action dropdown menu. (This will take you to the Family Lookup screen). Click **Submit**.
3	To search for a family member to link to this client, enter the **First** and **Last** name (or the first 3 letters of the Last Name) in the Client Lookup section and click **Search**. *If family is listed under Beacon Members, click the radio button next to the name to populate the Client Lookup fields. Click Search.*
4	Scroll down to review the **Display Results.** Click the **Client ID** number of the family member to access their record. *If the family member does not have a record in the database, see Add New Family Member.*
5	If this is the correct client/family member click **Continue** (not Edit and Continue).
6	Select the relationship to the Head of Household/**Grantee** from the dropdown menu.
7	Enter the client's information and select **Save and Continue.**
8	Enter the client's information into the **Income and Benefits** screen and click **Save and Continue.**
9	Enter the client's information into the **Educational Information Screen** and click **Save and Continue** to complete the family link.


Family Lookup
Added Members
Household Number : 1091
First Name
Last Name
Relation
SSN
Gender
DOB
Ann
Goodsell
Grantee
058022905
Female
05/27/1972
Beacon Members
SSN
First Name
Last Name
Gender
DOB
Records Not Found
Client ID :
(OR)
Legal First Name :
Charles
Legal Last Name :
Goodsell
Social Security # :
Gender :
Exact Match ?
Sounds Like ?
Step 3
Search
Display Results
Client ID
Last Name
First Name
Social Security #
Date of Birth
Gender
2098
Goodsell
Charles
025-93-3248
04/26/1971
Male
New Client
Step 4

Add Service

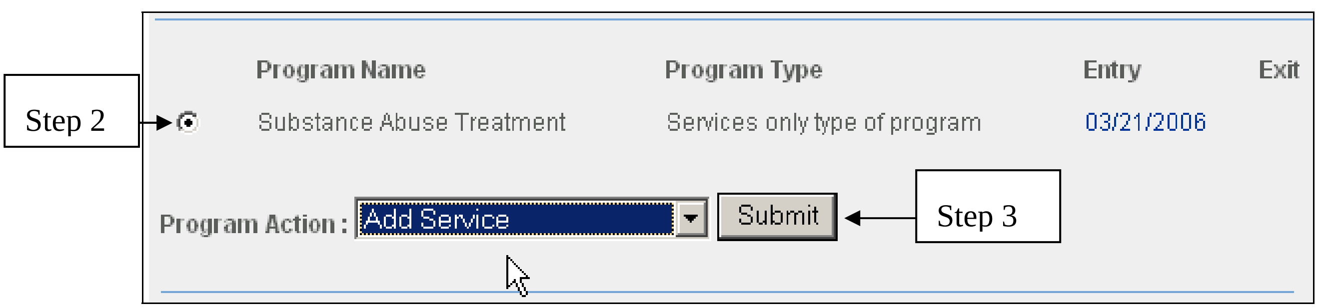
Providers may wish to track the various Services provided to their clients within the context of their program offerings.

The Add Service feature under the Program Action menu is the tool used to record Services provided to clients.

Add Service Steps

To record a Service provided to a client:

Steps	Action
1	Use **Client Lookup** or click **<u>Profile</u>** to get to the Client Activity Information Page.
2	Select a Program to which the **Service** will be added by clicking once on the radio button next to the correct Program name.
3	Select **Add Service** from the Program Action dropdown menu. Click **Submit.**
4	Enter the Service information in the appropriate fields. Please note that the end date is optional, but the Service **Start Date** and **Type of Service** are required. Click **Save.** *To view a previously entered Service, click once on the* **+** *sign next to the Program name on the Client Activity Information Page.*



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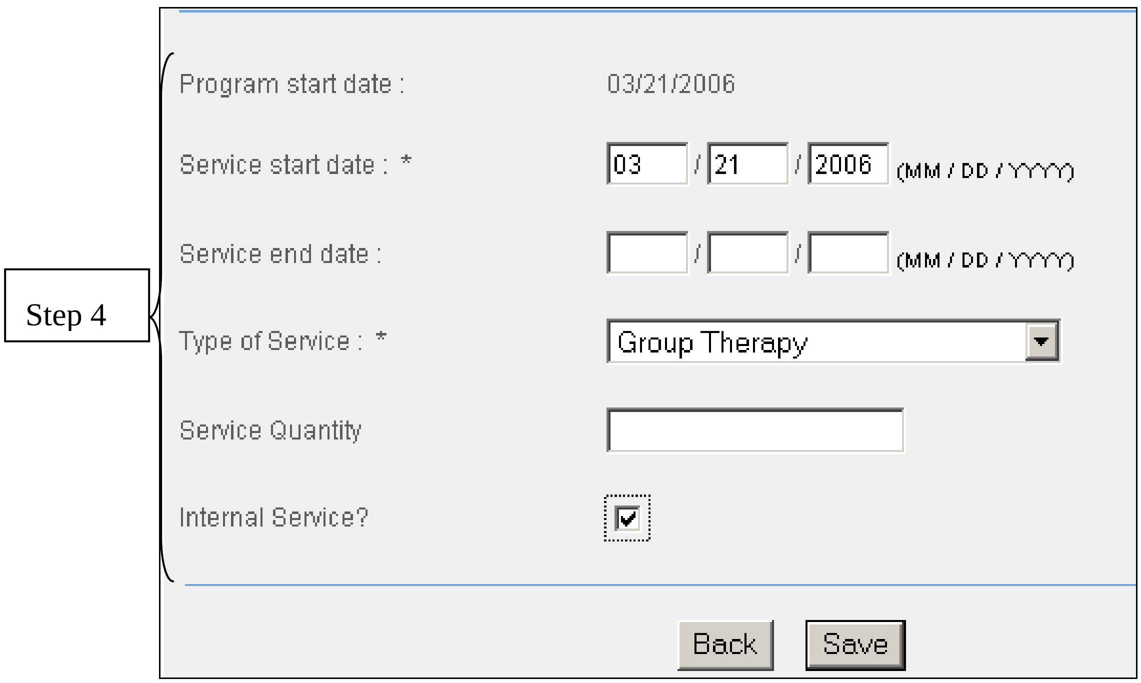
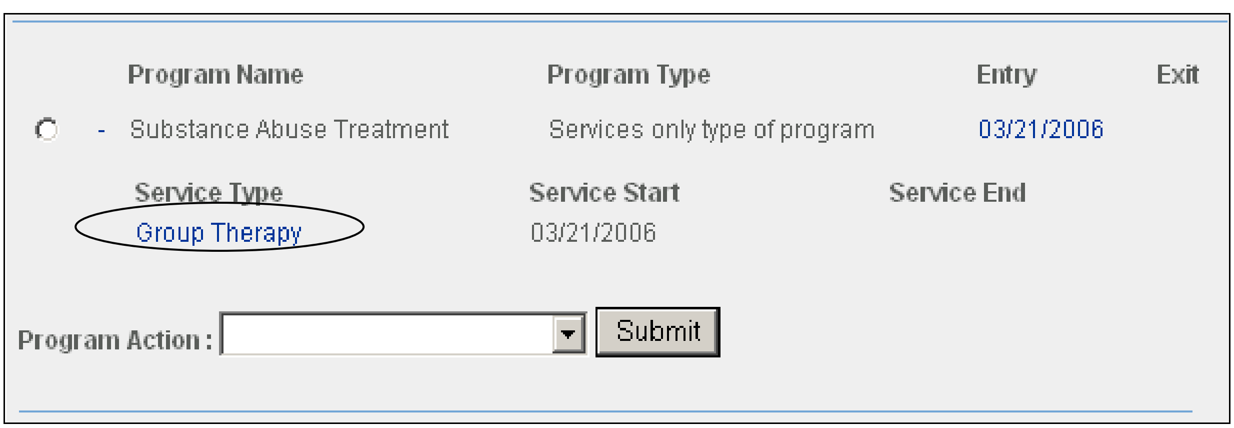


Editing a Service Entry

To review or edit a Service entry click once on the name of the Service, which is a hyperlink. (You may first have to click on the **+** sign to access the **Service** information.)



Update Income and Benefits

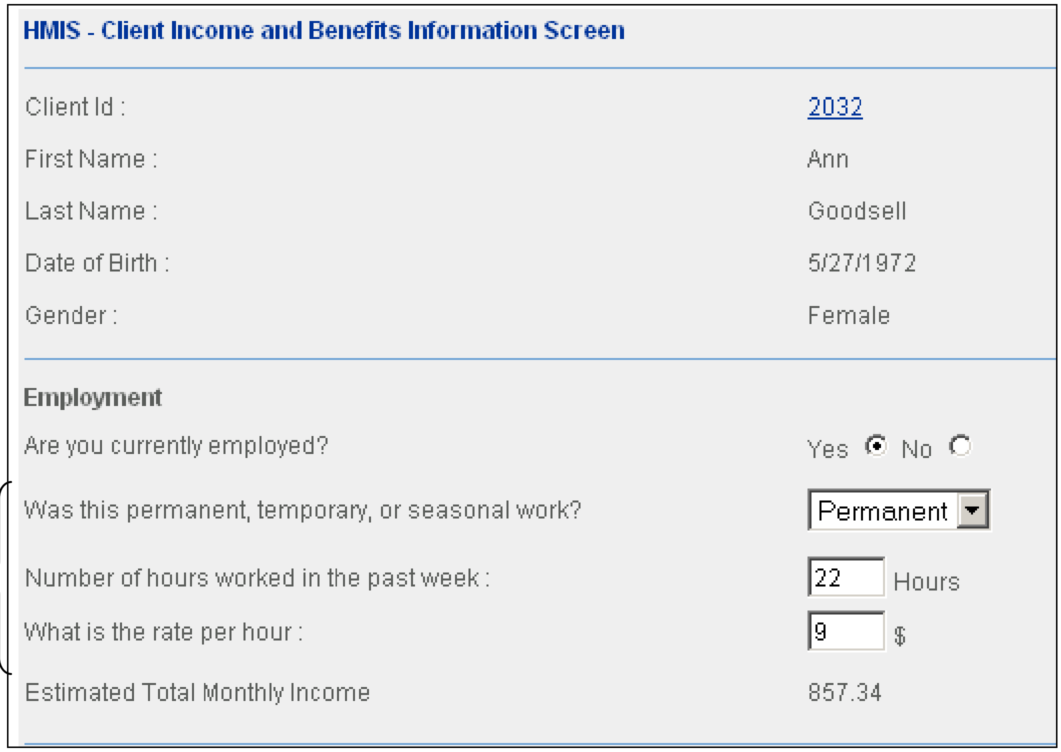
The Update Income and Benefits Section from the Program Action dropdown menu records and sums all income the client is receiving on an ongoing basis.

*The **Income and Benefits** may have been entered when the client was being registered for the program. This feature can be used to edit or update the information.*

Update Income and Benefits Steps

To update or edit the client's Income and Benefits:

Steps	Action
1	Utilize **Client Lookup** or click on **Profile** to get to the Client Activity Information Page.
2	Select the Program which needs to be updated by clicking once on the radio button next to the Program name.
3	Select **Update Income and Benefits** from the Program Action dropdown menu. Click **Submit.**
4	Answer "Yes" or "No" to the question of the client's employment status. If "Yes," enter the number of **hours per week** and the **rate per hour**
5	Click once outside these fields (in the gray area surrounding the boxes) to activate the automatically calculated **Estimate Total Monthly Income**.
6	Type the amount revealed in the Estimated Total Monthly Income into the **Earned Income** field under the **Income Sources** table.
7	Enter all other Income Sources in the **Monthly Amount** fields
8	Enter all **Non-Cash Benefits**. Click **Save**.



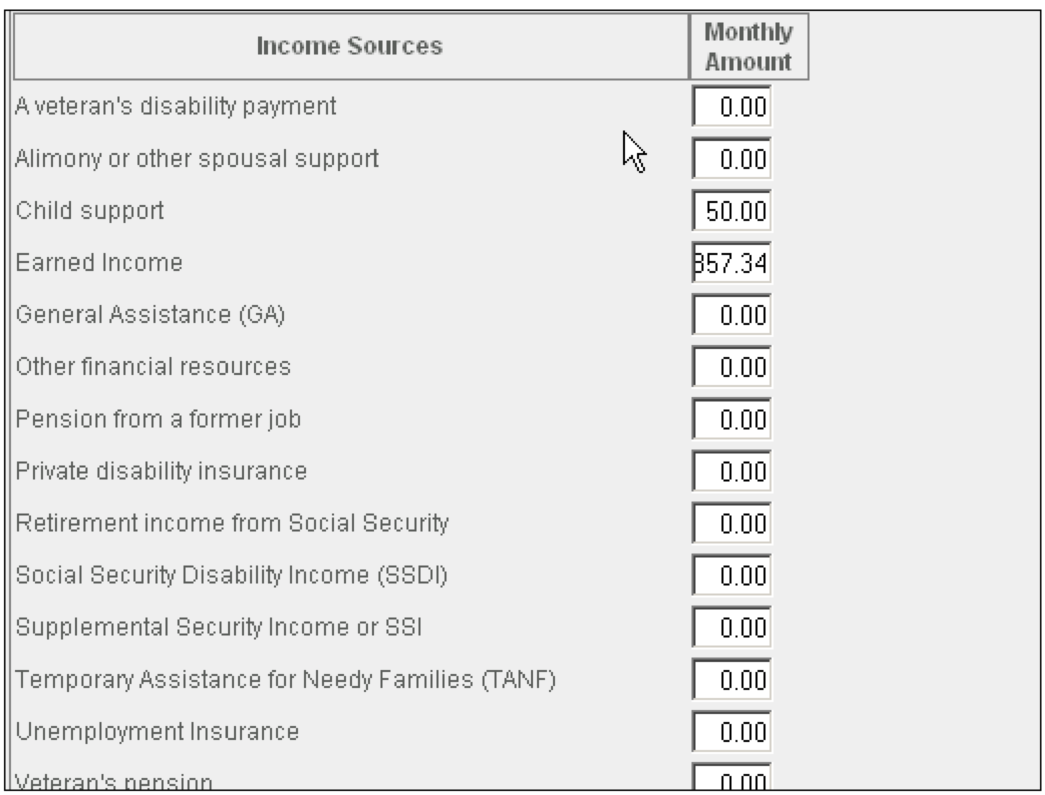
HMIS - Client Income and Benefits Information Screen

Client Id :	2032
First Name :	Ann
Last Name :	Goodsell
Date of Birth :	5/27/1972
Gender :	Female

Employment

Are you currently employed?	Yes ● No ○
Was this permanent, temporary, or seasonal work?	Permanent
Number of hours worked in the past week :	22 Hours
What is the rate per hour :	9 $
Estimated Total Monthly Income	857.34

Step 4



Income Sources	Monthly Amount
A veteran's disability payment	0.00
Alimony or other spousal support	0.00
Child support	50.00
Earned Income	857.34
General Assistance (GA)	0.00
Other financial resources	0.00
Pension from a former job	0.00
Private disability insurance	0.00
Retirement income from Social Security	0.00
Social Security Disability Income (SSDI)	0.00
Supplemental Security Income or SSI	0.00
Temporary Assistance for Needy Families (TANF)	0.00
Unemployment Insurance	0.00
Veteran's pension	0.00

Step 7

For more information on Income and Benefits see Program Entry.

Program Exit

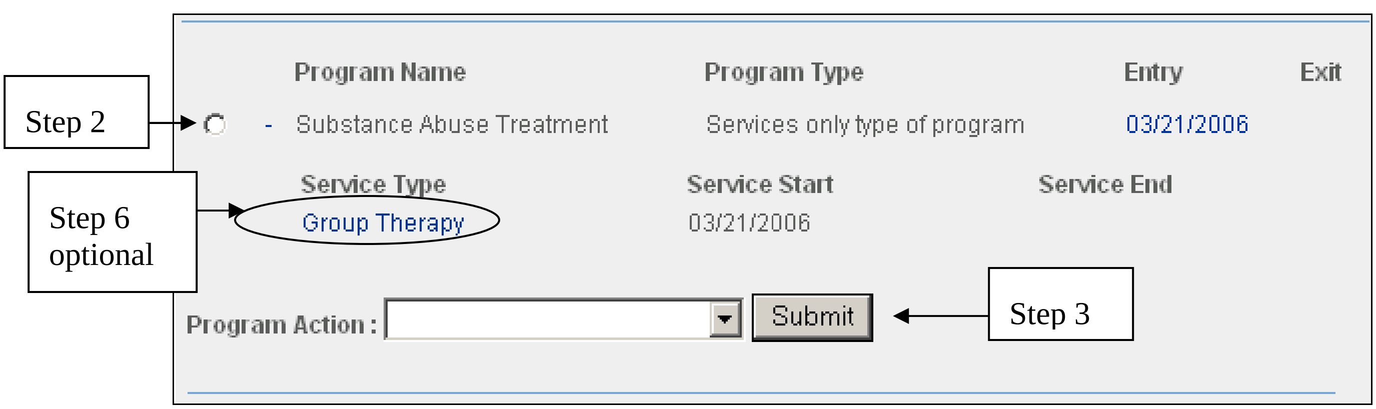
Program Exit information includes feedback regarding the client's destination, education, general health status and Income and Benefits information at or near the time a client leaves a program. *(Please note family members must be exited from SHORE separately.)*

Program Exit Steps

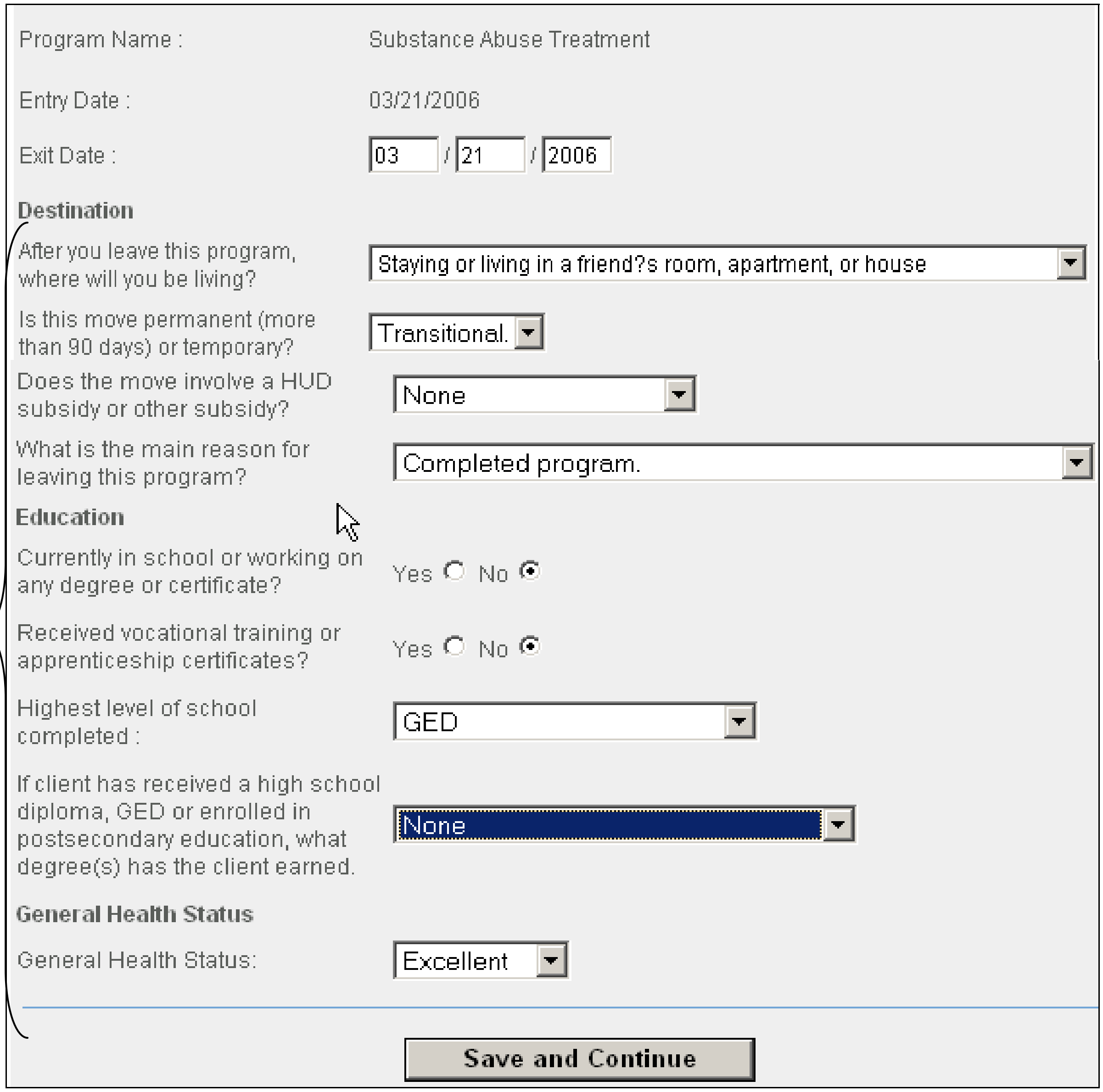
To exit a client from a Service or a Program:

Steps	Action
1	Utilize **Client Lookup** or click on **Profile** to get to the Client Activity Information Page.
2	Select the Program the client is exiting from by clicking once on the radio button next to the Program name.
3	Select **Exit** from the **Program Action** dropdown menu. Click **Submit**
4	Enter the client's information in the appropriate fields in the Client Program Exit Screen. Click **Save and Continue**.
5	Update **Income and Benefits** if necessary and select **Save and Continue** to complete the **Exit** process. *The exit date will now appear next to the program entry date on the client's profile page.*
6 (optional)	To exit a client from a **service**, click on the **Service** name (hyperlink) add the **Exit Date** and click **Save**. *Services must have an end date within the same operating year for Programs to be included in the APR report.*

Service Exit Steps (step 6 above)



Step 4



Program Name :	Substance Abuse Treatment
Entry Date :	03/21/2006
Exit Date :	03 / 21 / 2006
Destination	
After you leave this program, where will you be living?	Staying or living in a friend?s room, apartment, or house
Is this move permanent (more than 90 days) or temporary?	Transitional.
Does the move involve a HUD subsidy or other subsidy?	None
What is the main reason for leaving this program?	Completed program.
Education	
Currently in school or working on any degree or certificate?	Yes ○ No ◉
Received vocational training or apprenticeship certificates?	Yes ○ No ◉
Highest level of school completed :	GED
If client has received a high school diploma, GED or enrolled in postsecondary education, what degree(s) has the client earned.	None
General Health Status	
General Health Status:	Excellent

Save and Continue

HMIS - Client Income and Benefits Information Screen

Client Id :	2032
First Name :	Ann
Last Name :	Goodsell
Date of Birth :	5/27/1972
Gender :	Female

Employment

Are you currently employed? Yes ○ No ◉

If client is not currently employed,is the client looking for work? Yes ○ No ◉

Income Sources	Monthly Amount	Internal Sources Information	
		Reported Amount	Reported Date
A veteran's disability payment	0.00	0.00	
Alimony or other spousal support	0.00	0.00	
Child support	50.0	50.0	03/22/2006
Earned Income	857.34	857.34	03/22/2006
General Assistance (GA)	0.00	0.00	
Other financial resources	0.00	0.00	
Pension from a former job	0.00	0.00	
Private disability insurance	0.00	0.00	
Retirement income from Social Security	0.00	0.00	
Social Security Disability Income (SSDI)	0.00	0.00	
Supplemental Security Income or SSI	0.00	0.00	
Temporary Assistance for Needy Families (TANF)	0.00	0.00	
Unemployment Insurance	0.00	0.00	
Veteran's pension	0.00	0.00	

Chapter Four: Bed Register

Introduction

The Bed/Room Register shortcut is located in the Client Services menu (on the left side of the screen). The Bed Register allows the user to look up a room list, review its contents, and perform Bed Register actions.

The following pages will demonstrate each of the Bed Register capabilities.

Look up Bed List

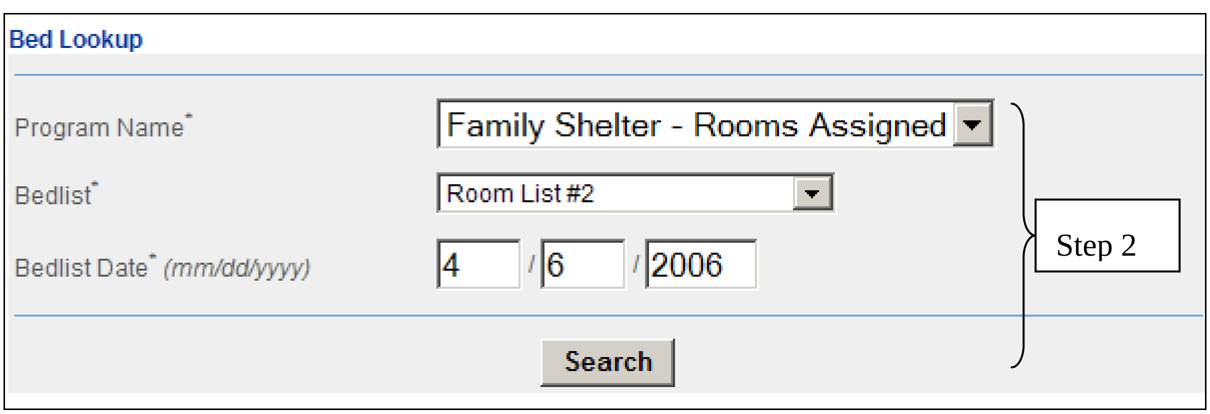
To display a Bed Lookup Display Results:

Please note the Grantee's information should be entered into the Bed Register to enter the family into that room.

Steps	Action
1	Select the **Bed Register** hyperlink.
2	Select the Program Name and Bed List; modify the Date if necessary and click **Search** to generate the query**.**
3	Scroll down to view the **Display Results**. This view will display available rooms, who is assigned and/or checked into specific rooms and which rooms if any are on hold.

*The **Action** dropdown menu is located at the bottom of this page and is the starting point for most actions involving a **Bed Register**.*

Family Shelters <u>do not need</u> the Check in All, Find Client, Release Reservations or Roll Over functions (these are for Individual Overnight Shelters).



Assign a Bed

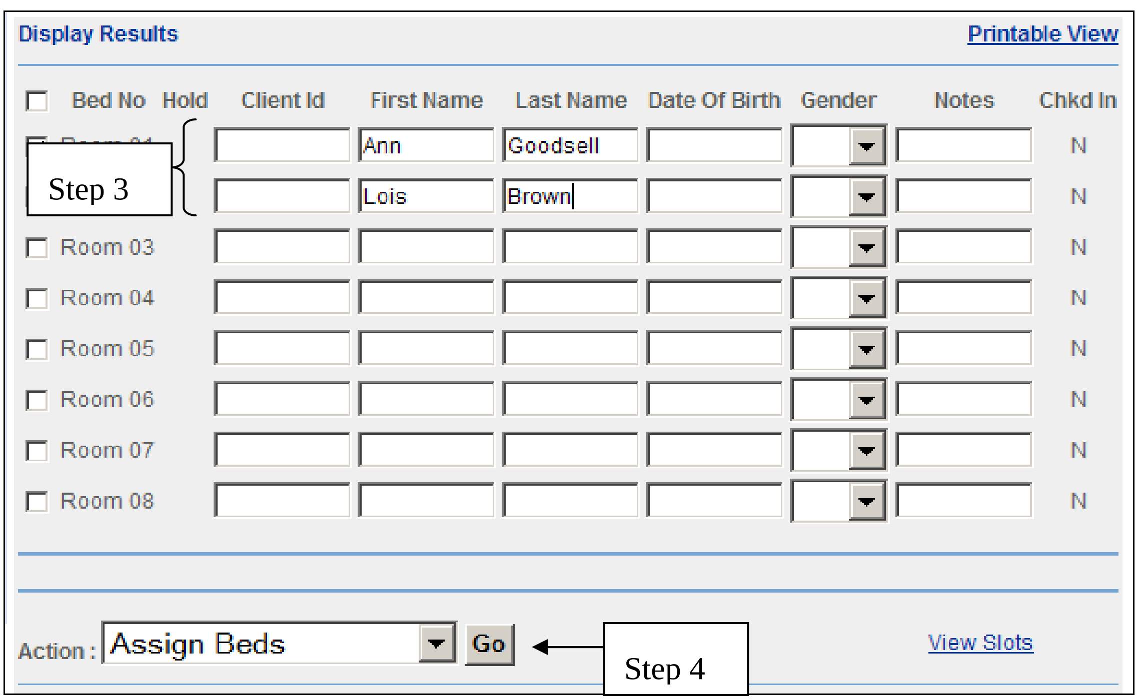
The Assign Bed function acts as a placeholder on the Bed Register until the client is ready to be checked in.

The client does not need to have a Client ID number to be assigned.

Steps for Assign Bed

To Assign a Bed:

Steps	Action
1	Click on the **Bed Register** hyperlink.
2	Select the Program Name, Bed List, enter the Date and click **Search.** Scroll down to the bottom of the page.
3	Enter the **First** and **Last Name** of the client(s) in the appropriate fields. *They do not need to have a client record in SHORE at this point.*
4	Select **Assign Beds** from the **Action** dropdown menu. Click **Go.** *Make sure the Assign Beds option is highlighted before clicking go***.**



Check In

Clients may be Assigned to a room prior to being checked in or these actions may be done simultaneously through the Check In process.

Steps for Check In

To check a client in:

Clients entered into the Bed Register should be the head of household.

Steps	Action
1	Select the **Bed Register** hyperlink.
2	Select the Program Name and Bed List; enter the Date and click **Search.** Scroll down to the bottom of the page.
3	Check the box next to the bed number(s); enter the client's **First** and **Last Name**. *Multiple clients may be checked in at the same time.*
4	Select **Check In** from the **Action** dropdown menu and click **Go**.
5	Scroll down to view the **Display Results**.
6	Click ***Check In*** next to the Client's ID or select **New Client** to create a New Client Record. *(See Add New Client for more information.)*
7	If more than one client was selected for check in, the View Client Information Screen will reappear with the next client's information in the **Display Results**. Repeat Steps 5 & 6 as needed.
8	When completed, the Bed Lookup Screen Display Results will have a "**Y**" instead of a "**N**" under **Chkd In** which indicates they were successfully **Checked In.**

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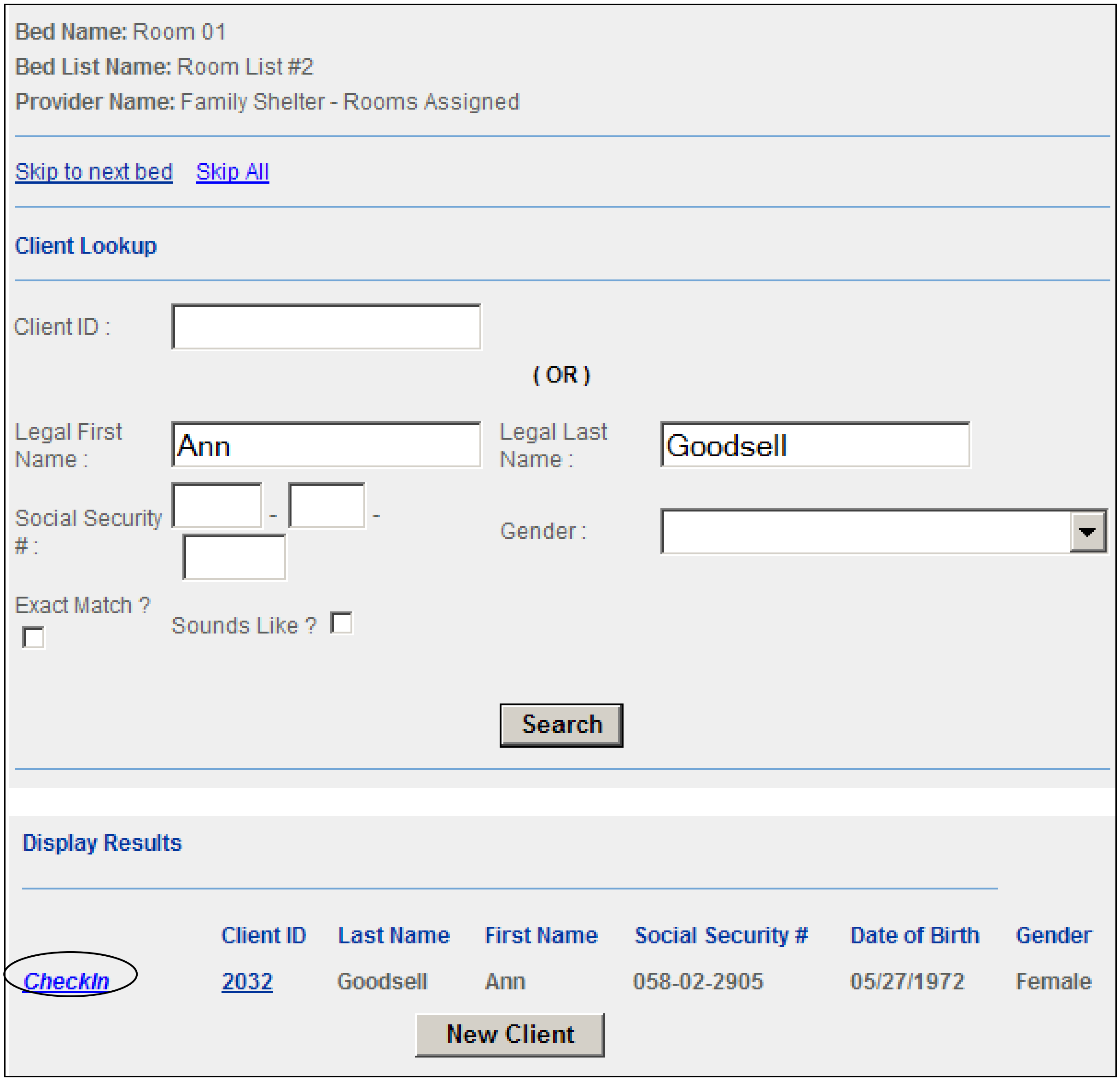
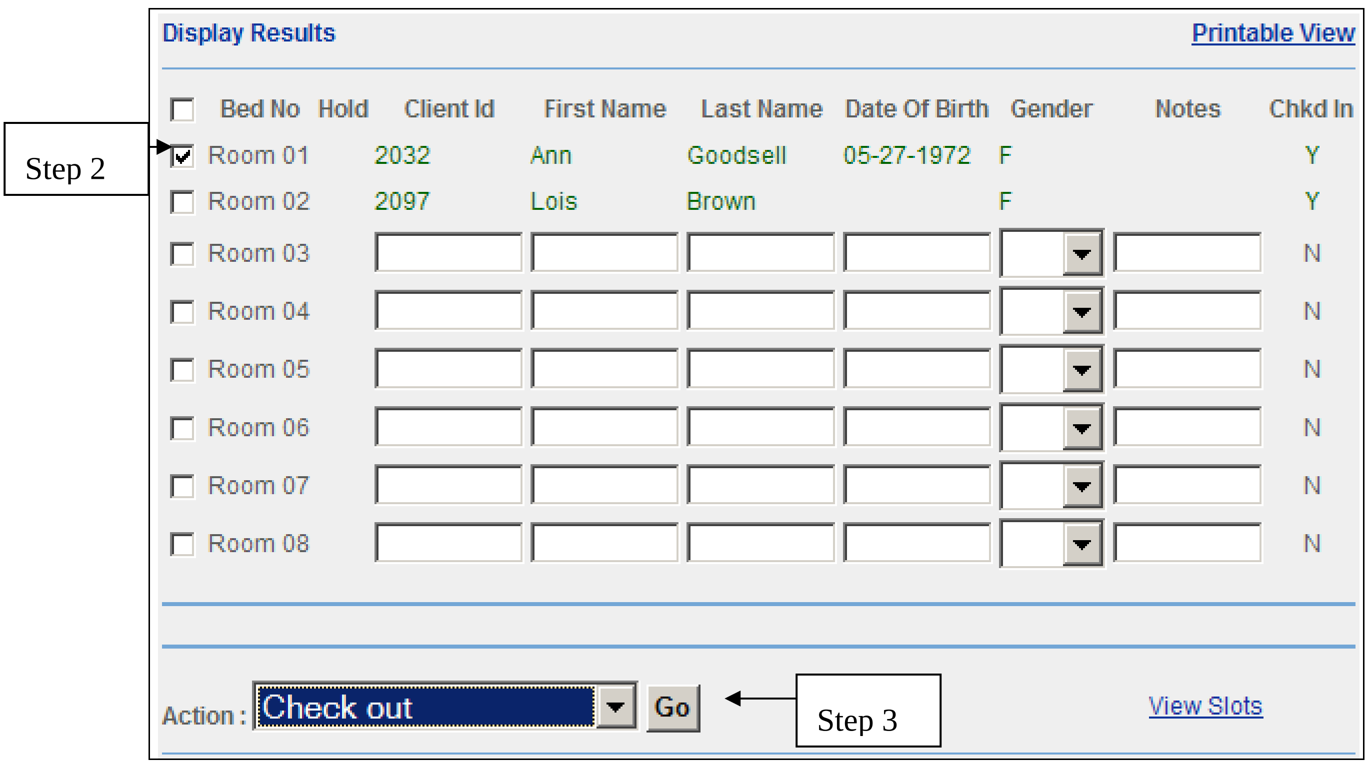

Bed Name: Room 01
Bed List Name: Room List #2
Provider Name: Family Shelter - Rooms Assigned
Skip to next bed
Skip All
Client Lookup
Client ID :
(OR)
Legal First Name :
Ann
Legal Last Name :
Goodsell
Social Security # :
Gender :
Exact Match ?
Sounds Like ?
Search
Display Results
Client ID
Last Name
First Name
Social Security #
Date of Birth
Gender
CheckIn
2032
Goodsell
Ann
058-02-2905
05/27/1972
Female
New Client

Check Out Once a client leaves a program, they need to be checked out so that an Exit date is recorded and the bed/room register space is cleared

Check Out Steps To check out a client:

Steps	Action
1	Enter the selected Bed List and the **Bed Lookup Display Results** screen. Scroll down.
2	Check the rooms next to the clients to be **Checked Out**.
3	Select **Check Out** from the **Action** dropdown menu. Click **Go**.



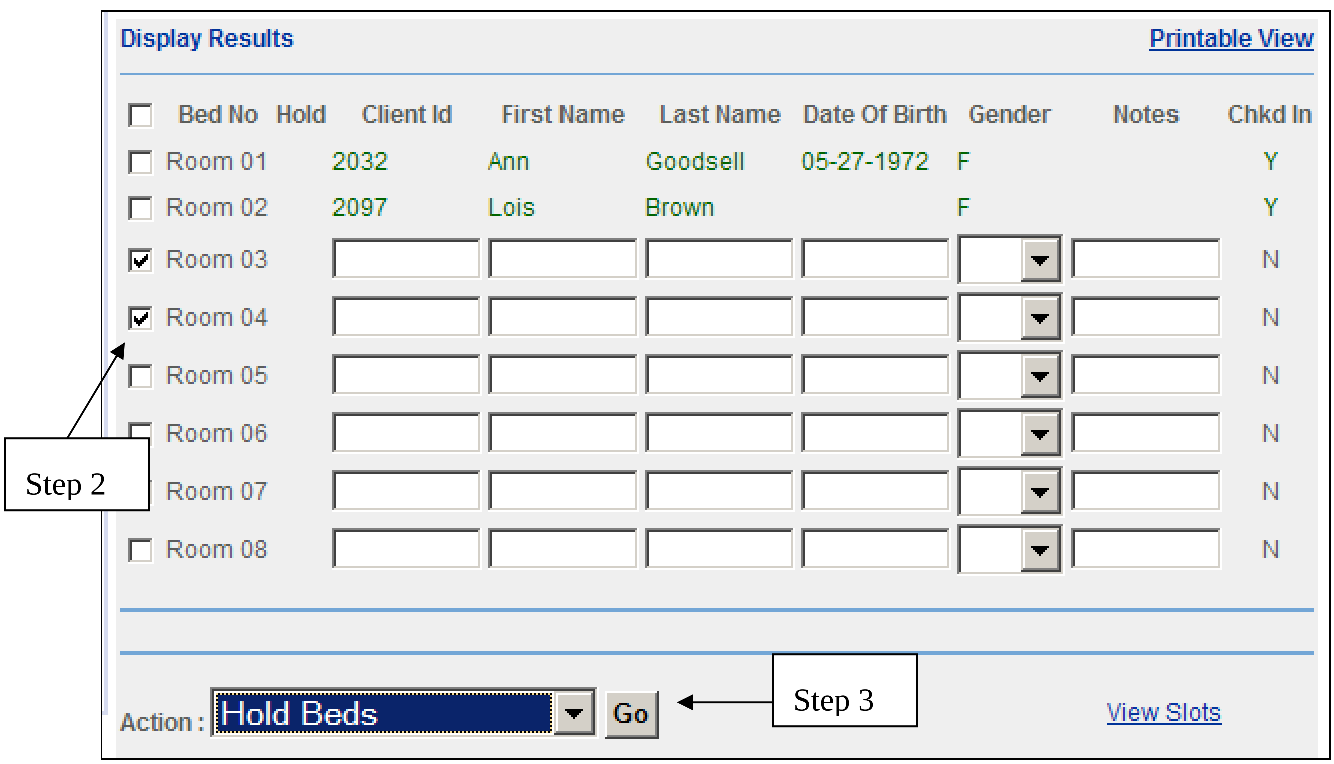
Hold Beds

Unlike in Assign Beds where a client's name must be entered to save a room, using the Hold Beds feature allows a room to be saved without any client information.

Hold Beds Steps

To Hold a Bed:

Steps	Action
1	Enter the selected Bed List and the **Bed Lookup Display Results** screen.
2	Check the Bed(s) to **Hold**.
3	Select **Hold Beds** from the **Action** dropdown menu and click **Go**. The room will now have a "Y" next to the room number. *Once a room is on Hold, no client information can be entered into that room.*



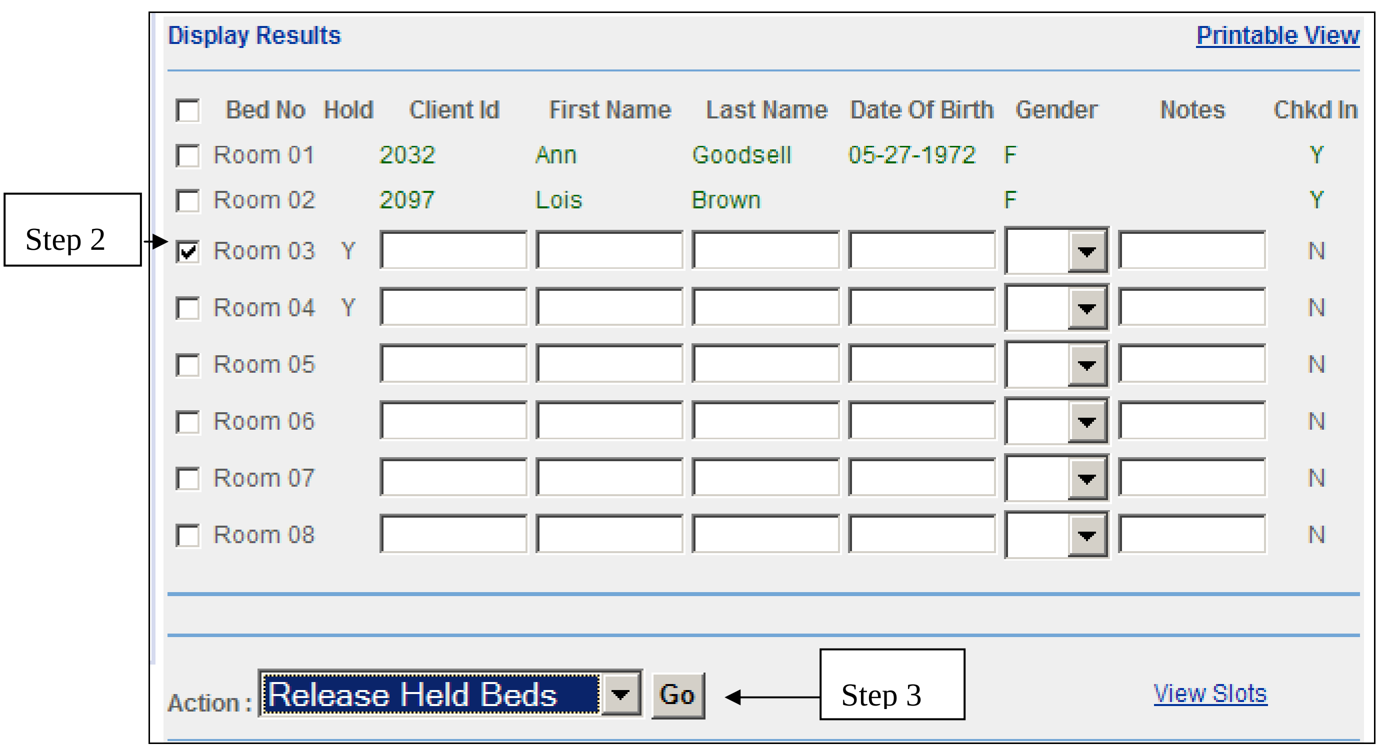
Release Held Beds

Release the Held Bed to enter a client's name into that room.

Steps for Release Held Beds

To release a Held Bed:

Steps	Action
1	Enter the selected Bed List and the **Bed Lookup Display Results** screen.
2	Check the Bed/Room(s) on hold to release.
3	Select **Release Held Beds** from the **Action** dropdown menu and click **Go**. *The "Y" will then be removed from Room.*



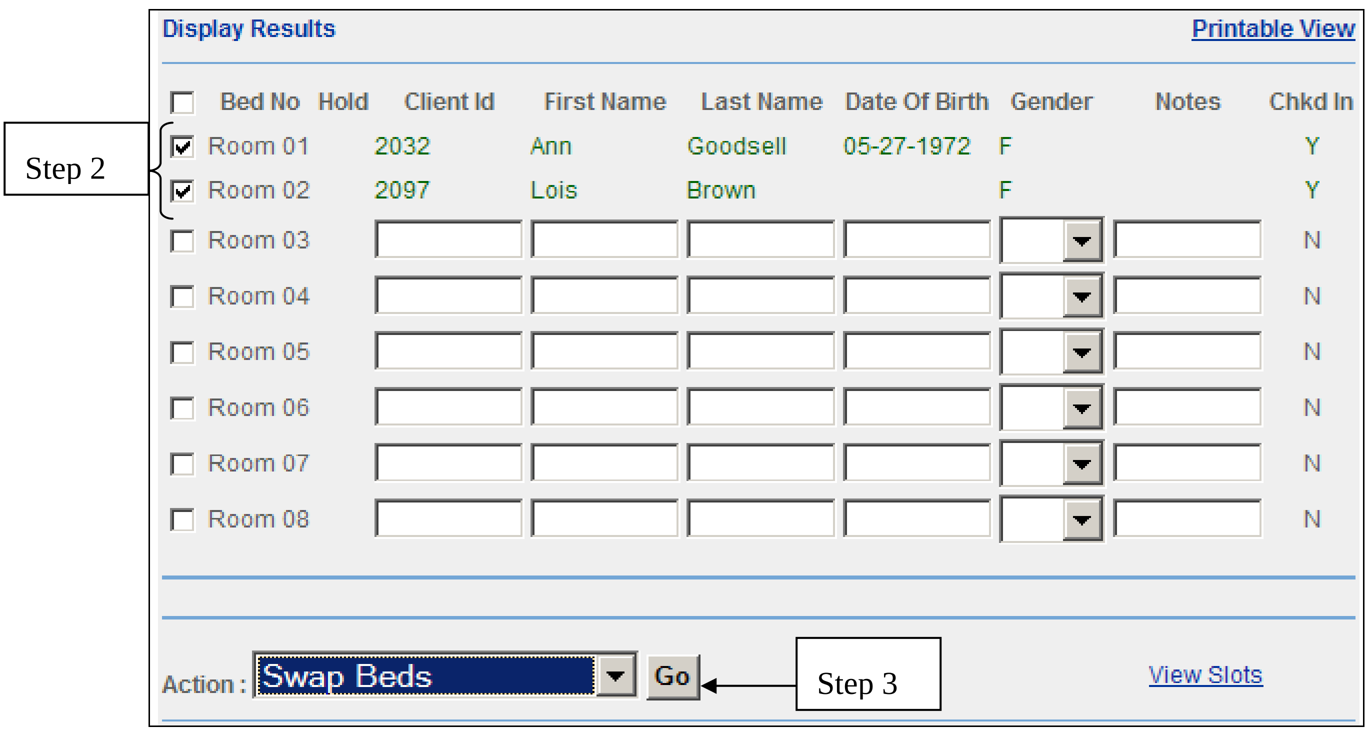
Swap Beds

The Swap Beds function allows the user to move a family to an unoccupied room or to exchange two clients' rooms on the Bed Register.

Steps to Swap Beds

To Swap Beds:

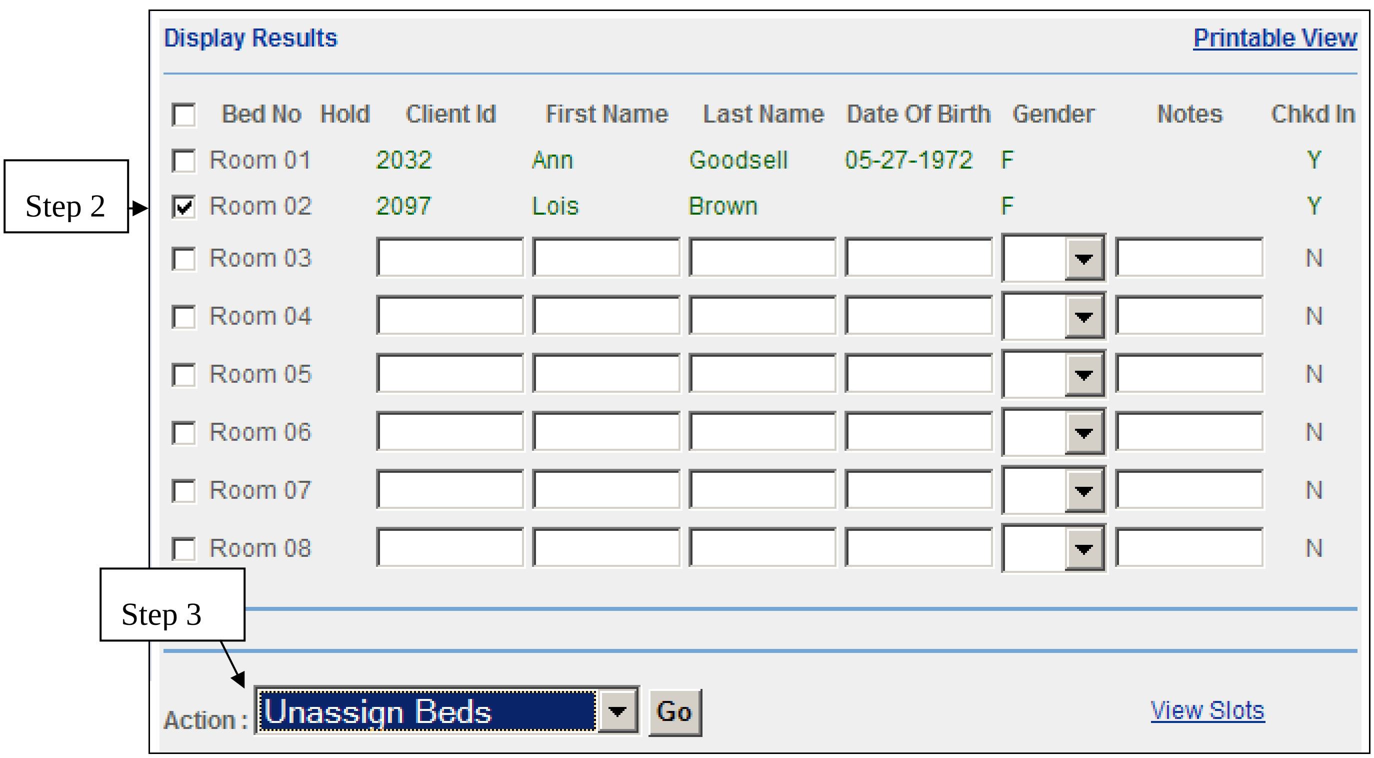
Steps	Action
1	Enter the selected Bed List and the **Bed Lookup Display Results** screen.
2	Check the two beds to be **Swapped**.
3	Select **Swap Beds** from the **Action** dropdown menu and click **Go**.



Unassign Beds — A client's name may be removed from a Bed List before the client has been checked in.

Unassign Bed Steps — To Unassign Beds:

Steps	Action
1	Enter the desired Bed List and the **Bed Lookup Display Results** screen. Scroll down.
2	Check the beds to be **Unassigned**.
3	Select **Unassign Beds** from the **Action** dropdown menu. Click **Go**.



Chapter Five: Administrative Functions

Introduction

This feature allows the user to merge duplicate Provider records of the same client.

Merge Client Steps

To Merge Client records:

Steps	Action
1	Select the Merge Client hyperlink from the left side of the screen.
2	Enter the **Client ID** (if available).
3	Enter the client's **First Name, Last Name, Social Security Number (SSN), Gender**, and/or **Date of Birth**. *Enter as many fields of information that are available to you. Not all of the fields are required but at minimum the first three letters of the client's Last Name; Social Security Number* ***or*** *Client ID is needed.* Click **Search.**
4	Scroll down to view **Display Results** and select the first client to be merged by clicking on the Client ID (hyperlink).
5	Click on **Select Second Client** and follow steps 2, 3 & 4.
6(Optional)	By default the system will merge the second client's record into the first client's record. To change this, select the **Merge To** button under the **Second Client** Record.
7	Click **Merge.**

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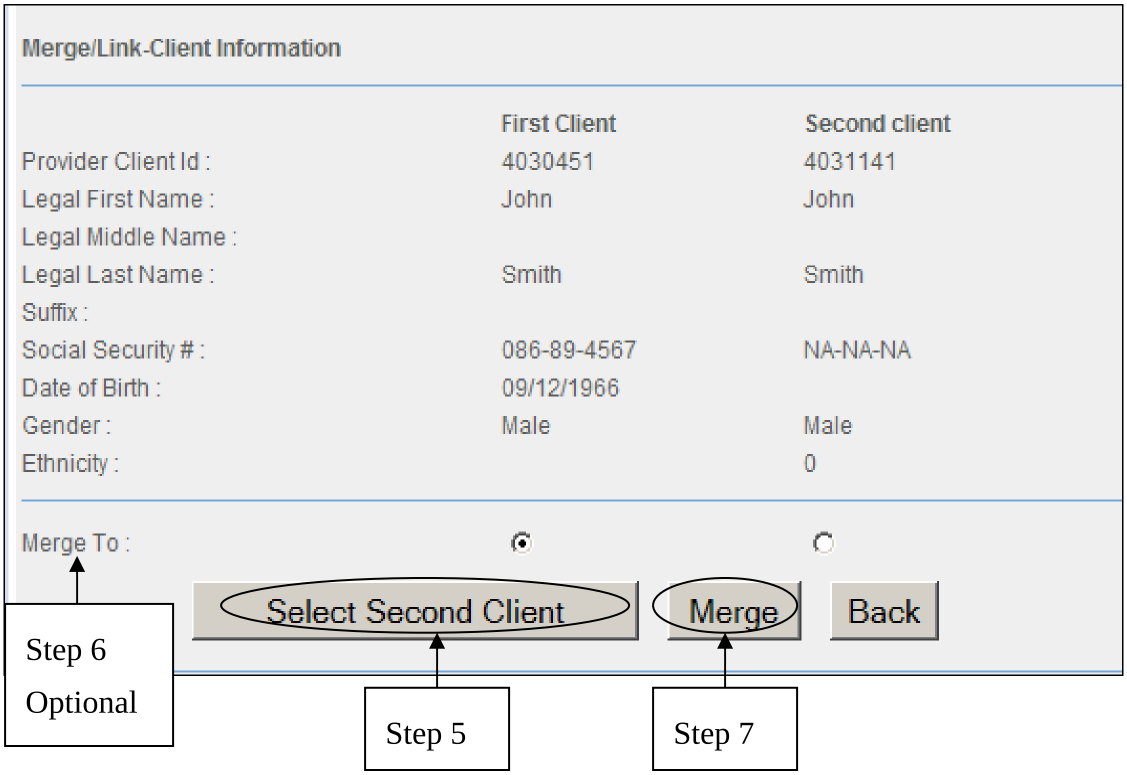
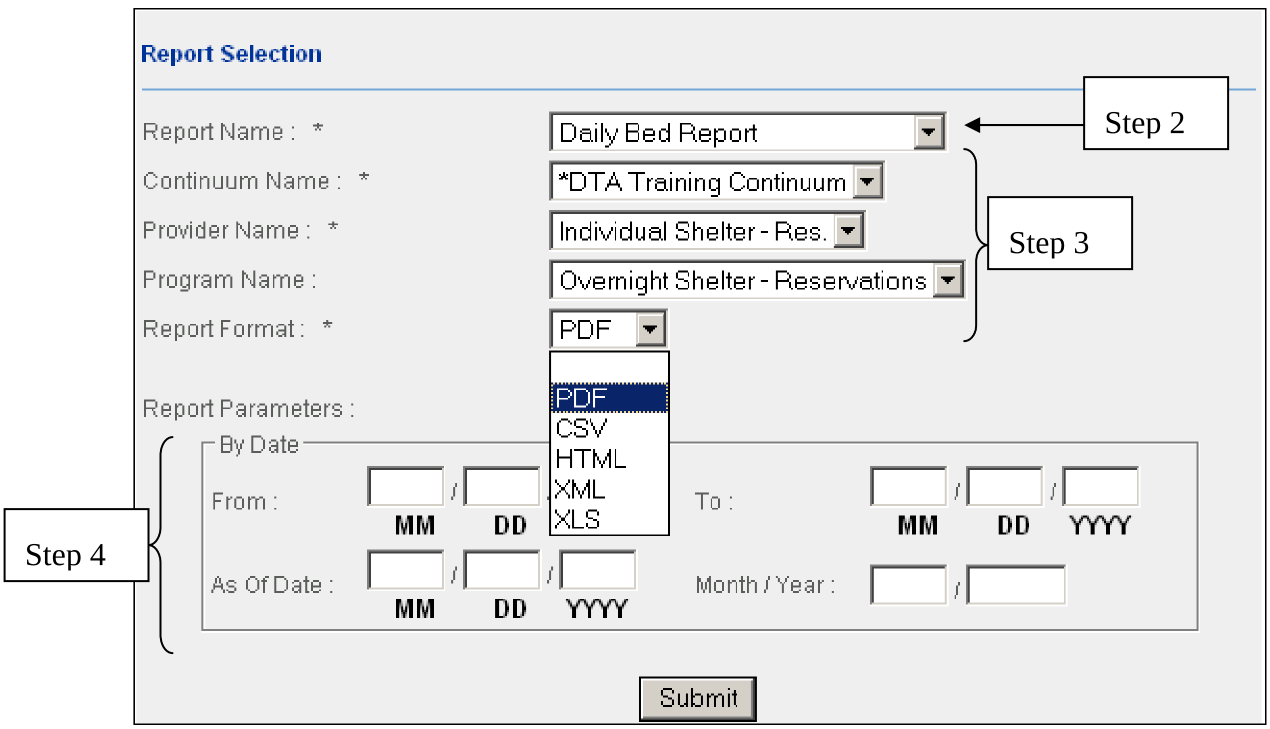

Merge/Link-Client Information
First Client
Second client
Provider Client Id : 4030451 4031141
Legal First Name : John John
Legal Middle Name :
Legal Last Name : Smith Smith
Suffix :
Social Security # : 086-89-4567 NA-NA-NA
Date of Birth : 09/12/1966
Gender : Male Male
Ethnicity : 0
Merge To :
Select Second Client
Merge
Back
Step 6
Optional
Step 5
Step 7

Request Reports Steps

To generate and request a Report:

Steps	Action
1	Choose Request Report from the Client Menu.
2	Select one of the pre-determined reports by clicking on the **Report Name** dropdown menu.
3	Choose desired report parameters by selecting from the follow dropdown menus: **Continuum, Provider, Program and Report Format.**
4	Continue entering the report parameters by choosing the **dates** to mark the beginning and end of the time frame the report represents.
5	Click **Submit**.

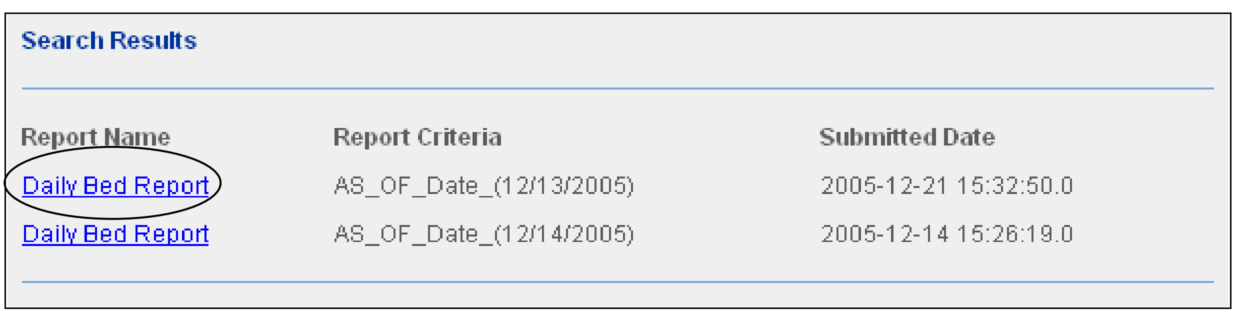


Description of File Types/Report Formats

PDF	Portable Document Format. This format allows anyone to view this document without the ability to edit/change contents (You must have Adobe Reader which can be downloaded from the web at no cost).
CSV	Comma Separated Value. At its name implies this format separates field values with commas. This format allows you to import your data into most spreadsheet or database programs.
HTML	Hypertext Markup Language. This is a format commonly used for web documents and provides an easy on-line view of the data.
XML	Extensible Markup Language.
XLS	Microsoft Excel format.

View Reports

Steps	**Action**
1	Based on the Criteria entered a report is generated by the SHORE system. To View this report or previously generated reports, click on View Reports from the Client Menu.
2	Select the type of report to view from the **Report Name** dropdown menu and click **Search**. *The reports will be listed in chronological order starting with the most recent.*
3	Click on the Report Name to view the report. *This report can be printed on the user's local printer*.



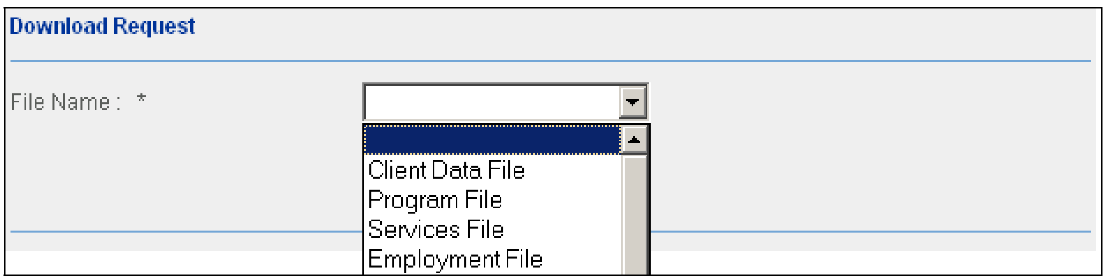
Downloads

The Download function allows the user to generate reports and download them from the SHORE database based on chosen parameters.

Request Downloads Steps

To generate and request a Download:

Steps	Action
1	Choose Request Download from the Client Menu.
2	Select one of the predetermined file types by clicking on the **File Name** dropdown menu. Click **Submit**.



View Downloads

Steps	Action
1	Based on the above Criteria a download is generated. To **View** this download or previously generated downloads, click on View Downloads from the Client Menu.
2	Select the type of download to view from the **File Name** dropdown menu and click **Search**. *The reports will be listed in chronological order starting with the most recent.*
3	Click on the Report Name hyperlink to **Save**, **Download** and **View** the report in **Excel**. At t*his point, the report is no longer linked to SHORE and can be filtered, edited and shared at the discretion of the Provider.*

APPENDIX A: DEFINITION OF ROLES

Role	Role Assignment Description
HMIS Provider Intake Specialist I	This role is assigned to employees that are responsible for basic intake of client information and the registering of clients within the "Bed Register."
HMIS Provider Intake Specialist II	This role is assigned to employees that are responsible for basic intake of client information and the registering of clients within the "Bed Register." This role also has access to basic client management functionalities, including program entry, program exit, and services maintenance.
HMIS Provider Case Manager	This role is assigned to employees that are responsible for adding existing clients to programs and tracking the services provided. Case Managers are also able to enter basic client information and register clients within the "Bed Register."
HMIS Provider Technical Specialist	This role is assigned to employees that are responsible for updating administrative information. Technical Specialists do not have the ability to view client and program information within the system.
HMIS Provider Supervisor	This role is assigned to provider employees that are responsible for both updating administrative related information and managing client and program information within the system. This is the highest level of HMIS access available to provider employees.

APPENDIX B: DESCRIPTION OF ROLES

Role	HMIS Provider Intake Specialist I	HMIS Provider Specialist II	HMIS Provider Case Manager	HMIS Provider Technical Specialist	HMIS Provider Supervisor
View bed list	Yes	Yes	Yes	No	Yes
Bed list entry	Yes	Yes	Yes	No	Yes
Client lookup	Yes	Yes	Yes	Yes	Yes
Add/update client	No	Yes	Yes	Yes	Yes
Case management	No	Yes	Yes	Yes	Yes
View organization data	No	No	Yes	Yes	Yes
Modify organization data	No	No	No	Yes	Yes
User Maintenance	No	No	No	Yes	Yes
System Maintenance	No	No	No	No	No
Client Merge	No	Yes	Yes	No	Yes
Client Link	No	No	No	No	No
Reports	No	No	Yes	No	Yes
Downloads	No	No	Yes	No	Yes

Glossary of Terms

Client ID	A unique identification number generated by the HMIS for a client.
Individual Social Security Number	A unique identification number assigned to an individual by Social Security Administration
Legal First Name	Individual's first name
Legal Middle Name	Individual's middle name
Legal Last Name	Individual's last name
Suffix	Individual's title
Date of Birth	Individual's date of birth
Gender	Individual's gender
Ethnicity	Individual's ethnicity
Race	Individual's race
Registration Date	The date when an individual is registered into HMIS
Bar Begin Date	The date when a bar period starts for an individual
Bar End Date	The date when a bar period ends for an individual
Provider Code	Provider's unique code
Program Entry Date	The date when an individual was entered into a Program
Physical Disability	The condition of being unable to perform (function) as a consequence of physical unfitness
Developmental Disability	The condition of being unable to perform (function) as a consequence of mental illness
HIV / AIDS	A serious disease of the immune system
HOPWA	Housing Opportunity for People with AIDS
Mental Health Problem	Mental illness
Long Term Disability	The condition of being unable to perform (function) for a long period of time
Substance Abuse Problem	A problem that expresses in abusing of various substances such as drugs, alcohol, etc.
Domestic Violence	Pattern of coercive and controlling behaviors and tactics used by one person over another to gain power and control
Earned Income	Income earned from work and other activities
Unemployment Insurance	Income received from unemployment agency

SSI	Social Security Supplemental Income
SSDI	Social Security Disability Income
Veterans Disability Payment	Payments received for disable conditions obtained on military service
Private Disability Payment	Payments received for disable conditions from private party
Worker's Comp	Compensation received for work related accident
TANF	Temporary Assistance for Needy Families
Retirement Income from Social Security	Payments received from Social Security Administration after retirement
Veteran's Pension	Pension received for military service
Pension from a former job	Pension received from a former job
Child Support	Payments received for child support
Alimony	Payments received from a divorced spouse
Food Stamps	Non-cash benefits that can be used for food
MEDICAID	State Medical Assistance Program
MEDICARE	Federal Medical Assistance Program
State Children's Health Insurance Program	Health insurance for children supplied by the State
WIC	Women, Infants and Children Program
VA Medical Services	Veteran Affair Medical Program
Section 8, Public Housing, or other Rental Assistance	Program that provides assistance with housing arrangements
Veteran	A person who served in the military
Military Service Eras	Periods of time when the United States military has participated in war
Duration of Active Duty	Time of service in the military
Served in a war zone	Time of service in a war zone
Name of war zone	Location where a war took place
Received hostile or friendly fire	Whether a person was in combat operations
Branch of the military	Name of the military force
Discharge status	Status indicating how an individual was discharged from the military

SRO	Single Room Occupancy Program
Continuum	A State agency that supervises various Providers according to state and federal regulations
Continuum of Care (CoC)	A Continuum of Care is a local or regional system for helping people who are homeless or at imminent risk of homelessness by providing housing and services appropriate to the whole range of homeless needs in the community, from homeless prevention to emergency shelter to permanent housing.
Provider	An agency that operates under a Continuum and obeys state and federal regulations.
CoC Code	HUD Assigned code for Continua of Care.
Provider Site	A location for a Provider's office.
Facility Code	An identification code for facility where services are provided (Locally Determined).
FIPS Code	Federal Information Processing Standards code. 10 digit FIPS code identifies geographic location of Provider.
Program	The Homeless Assistance Program makes available a continuum of services to homeless and near homeless individuals and families.
Funding Source	An organization that providers financial resources for a specific program.
Program Type	A type of the program offered by a Provider.
Grant Number	A number for a grant given to the specific Program or Provider.
Program Fee	A fee charged for entering into a specific program.
Program Group	A group of services under a specific program
HUD Service Type	Service Type distributed by HUD
DTA Service Type	Service Type distributed by DTA
Service	A specific provision provided to Homeless Individuals and Families under the Program and/or Provider.
Duration Category	A categorized period of time during which service was provided.
Activity Category	A categorized group of activities.
Resource	Available source of services provided.
Resource Type	A type of available sources of services provided.
Code Table	A table of codes for Funding Sources, Program Types and Service Types.

Code	An abbreviated name of services and programs available.
Sequence	An arrangement number for a Code in the Code Table.
User Name	A unique name of the user used to log into the HMIS
Log on ID	A unique identification of the user used to log into the HMIS
View	Schema of the security rights for a users or organization
Role	Role and security rights assigned to a user